

CASSIAR REGION

TOURISM OPPORTUNITIES ANALYSIS

Prepared for:

Ministry of Small Business, Tourism, and Culture

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Table of Contents

Executive Summary	1
1. Introduction	4
1.1 Background	4
1.2 Objectives	4
1.3 Study Area	6
1.4 Research Methodology	6
2. Area Description	10
2.1 Area Profile	10
2.1.1 Biophysical	10
2.1.2 Communities	10
2.1.3 Socio-Economic Characteristics	11
2.1.4 Tourism Profile	13
2.1.5 Future Outlook	14
2.2 Mapped Information	15
2.2.1 Northwest Tourism Inventory Mapped Data	15
2.2.2 Cassiar Digital Data	16
2.3 Tourism Facilities	17
2.3.1 Information Collection Process	17
2.3.2 Facility Descriptions	17
2.4 Strengths, Weaknesses, Opportunities And Threats	19
2.4.1 The Process	19
2.4.2 Strengths	20
2.4.3 Weaknesses	22
2.4.4 Opportunities	23
2.4.5 Threats	23
3. Tourism Product Analysis	25
3.1 Product Selection Process	25
3.2 Tourism Product Selection	27
3.3 LRMP Product Considerations	29
3.4 Product Information Sources	30
3.5 Product Modelling Analysis	31

4. Market Analysis	33
4.1 General Trends	33
4.1.1 Trends Impacting the Future of Tourism	33
4.1.2 Trends in Outdoor Recreation	34
4.1.3 Impacts of Societal Changes and Travel Trends	34
4.2 Tour Operator Perspectives	36
4.3 Other Market Information	37
4.4 Market Categories	38
4.5 Product Specific Market Information	39
4.5.1 Fishing	39
4.5.2 Hiking	40
4.5.3 Lodges	42
4.5.4 Ski Touring	43
4.5.5 River Recreation	46
4.5.6 Road Touring	48
4.5.7 Wildlife Viewing	49
5. Product Analysis	51
5.1 Fishing	51
5.2 Hiking	55
5.3 Lodges	58
5.4 Ski Touring	60
5.5 River Recreation	63
5.6 Road Touring	66
5.7 Wildlife Viewing	68
6. Tourism Development Considerations	71
6.1 LRMP Tourism Location Analysis	71
6.2 Product/Zone Match	72
6.3 Community Links	73
6.3.1 Dease Lake	74
6.3.2 Iskut	75
6.3.3 Telegraph Creek	75
6.4 Non-Adventure Tourism Development Opportunities	75
6.5 Tourism Development Services	77
6.5.1 Business Support Services	77
6.5.2 Community Tourism Infrastructure	78

7. Appendix

Appendix A – Operator Cover Letters	A-1
Appendix B – Contacts	B-1
Appendix C – Information Sources	C-1
Appendix D – Schematic Models	D-1
Appendix E – Product Maps	E-1

MAP INFORMATION

Existing Tourism Use

	File Size
Study Area Base Map	5,084KB
Tourism Operator Facilities / Base of Operations	2,943KB
Tourism Features, Routes and Activity Sites	Not Available
Tourism Use	2,947 KB

Tourism Product Capability

Backcountry Ski Touring	3,535KB
Fishing	Not Available
Hiking	3,985KB
Lodges	3,446KB
River Recreation	3,041KB
Vehicle Touring	Not Available
Wildlife Viewing	3,164KB

Executive Summary

The Project Background

The intent of this study is to identify tourism opportunities and provide direction for the expansion of existing, and development of new, tourism businesses. The study encompasses eco-tourism, soft adventure, and other tourism development possibilities within the region.

The Cassiar Region

The Cassiar Region is a large area of Northwest BC encompassing about 15% of the province's land mass. The region's attributes include the vast amount of wilderness, and the concentrations of big game wildlife species. Perhaps the most recognizable features of the area are Mt Edsiza, the Spatzizi Plateau, and the Grand Canyon of the Stikine. Key communities in the region are Dease Lake, Iskut and Telegraph Creek.

The area is characterized by its vast wilderness resources (15 million hectares), and its very limited population (1,500 residents). Traditional tourism activity was historically based on hunting, fishing and camping. More recent tourism activities have included various forms of land, water and/or snow based recreation.

Most of the backcountry activity would be considered "hard" adventure tourism, pursued by a small number of ardent and skilled outdoors enthusiasts. Frontcountry tourism has consisted of touring, camping and lodge-type activities, predominantly in the relatively brief summer season.

As remote as the area is from population centers and gateways, the region is well known. It has a positive image and appeal based primarily on the area's remoteness, its history, and its wilderness. It is a place that a relatively small number of people have been to, but a place that people want to visit.

The Products

Given the size of the region and the variety of terrain, a number of activity products are appropriate for the area. This includes many forms of land/water/snow based activities, and front and backcountry opportunities. Based on our analysis of the resources, markets and economic impact, the key tourism development opportunities are in freshwater fishing, hiking, lodges, river recreation, ski touring, vehicle touring and wildlife viewing.

The Markets

The Cassiar Region has two very distinct market segments - the casual drive-through market, and the destination market. The drive-through tourist market has been relatively stable over the last decade, but amounts to less than 100 vehicles a day annually. This through-traffic category has traditionally been difficult to tap, as Highway 37 acts as the arterial for traffic destined elsewhere. This market stops to purchase basic travel needs of food, fuel and enroute accommodation, but does not stay.

The other market category is those persons destined to the Cassiar region. This includes people who are travelling to the area to hunt, fish, canoe, kayak, ski tour, hike, view wildlife, or participate

in some other adventure tourism activity. Based on the limited number of facilities, this market is also small, numbering a few hundred persons at any one time.

The Adventure Tourism Opportunities

Generally, demographics are favouring the expansion of selected hard and soft tourism products. The trend-setter, hard adventurer type tourist is a small but growth market based on the quality of the resources, and the declining opportunities in other areas. The aging Baby Boomers are the market for the much larger soft adventure products. Both of these groups will expect value for money, and facility quality in keeping with the quality of the resources.

Possible locations for the product activities are as follows:

- | | |
|------------------|--|
| Fishing | <ul style="list-style-type: none">▪ The key frontcountry opportunities are the Iskut Lakes, Kiniskan Lake, Dease Lake and Dease River.▪ Backcountry opportunities are located in literally hundreds of fish bearing water bodies throughout the region. |
| Hiking | <ul style="list-style-type: none">▪ A tremendous number of First Nations trails located in the region.▪ Telegraph Trail from Iskut to Telegraph Creek and perhaps to Atlin▪ BC Rail grade along the Klappan River. |
| Lodges | <ul style="list-style-type: none">▪ Frontcountry opportunities exist in the Bob Quinn Lake area, Iskut Lakes area, Dease Lake, and Cassiar area.▪ Backcountry opportunities are in the Dease Plateau area, Tanzilla Plateau, and Taku Plateau, plus numerous lakes. |
| River Recreation | <ul style="list-style-type: none">▪ Key frontcountry locations include the Iskut, Tanzilla and Dease Rivers.▪ Backcountry opportunities exist on the Stikine, Sheslay, Tahltan, Chutine and Taku Rivers. |
| Ski Touring | <ul style="list-style-type: none">▪ Literally hundreds of areas with appropriate slope and north aspect▪ Key area includes the Cassiar Mountains, Skeena Mountains, and the Coast Mountains. |
| Vehicle Touring | <ul style="list-style-type: none">▪ Road touring is restricted to Highway 37 and the road to Telegraph Creek. |
| Wildlife Viewing | <ul style="list-style-type: none">▪ Excellent habitat exists throughout the area in literally dozens of drainages, some covering hundreds of thousands of hectares.▪ Generally south facing slopes and avalanche chutes are preferred habitat for sheep goats, and grizzly bear.▪ Valley bottom lakes are preferred habitat for moose and caribou. |

All of the above opportunities have commercial potential. Creating actual tourism developments from these opportunities will require site inspections, and due diligence evaluations on a case-by-case basis, by prospective proponents.

The Community Based Opportunities

The following tourism development opportunities are those most suited to or linked to the region's three communities.

- | | |
|-----------------|--|
| Dease Lake | <ul style="list-style-type: none">▪ A walking trail and interpreted wildlife viewing area.▪ An Interpretive Centre to profile the region's spectacular wilderness, geological resources, history and wildlife.▪ Act as the service and supply center for the area's tourism developments and facilities. |
| Iskut | <ul style="list-style-type: none">▪ Lodge development around Iskut Lakes▪ Hiking from Iskut to Telegraph Creek along the Telegraph Trail.▪ Tahltan Cultural Centre profiling and interpreting the history of the Tahltan First Nations. |
| Telegraph Creek | <ul style="list-style-type: none">▪ Fishing opportunities in the Stikine and area lakes.▪ Hiking from Telegraph Creek to Iskut and/or Atlin.▪ Road touring from Dease Lake to Telegraph Creek.▪ Heritage building restoration and focus on heritage theming. |

1. Introduction

1.1 Background

The Ministry of Small Business, Tourism and Culture (MSBTC) is sponsoring a Tourism Opportunities Study (TOS) for the Cassiar Forest District. This project is one of several studies being conducted in the province. It is a continuation of the Forest Recreation and Tourism Studies that the Tourism Branch has completed over the last three years, and the Tourism Resource Inventory (TRI) product modelling undertaken since 1992.

The intent of this study is to identify tourism opportunities and prepare a report that can be used as a planning tool for expansion of existing, and development of new, tourism businesses. The study encompasses eco-tourism and soft adventure opportunities within the forest recreation area and on other Crown land in the district.

Tourism Opportunity Studies are defined as information tools that can be used to identify and develop tourism development opportunities around the province. The studies are intended to be tools for existing and potential operators, governments and local communities. A TOS contains the following information.

- maps and a facility inventory of the area's current tourism industry
- maps and analysis depicting the kinds of tourism activities that appear to have potential in the area
- an analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT Analysis) facing the development of potential tourism products
- an overview of the best possible opportunities for development for each of the key communities in the study area.

The Cassiar TOS is intended to identify opportunities for future tourism development. The selected opportunities are expected to encompass eco-tourism and soft adventure activities on Crown land within the study area. The information generated is intended to support community-led tourism development. Expansion of the tourism industry is intended to:

- diversify local economies
- maintain access to recreational resources for local residents
- minimize conflicts between resource users

The information provided by this project is intended to lay the foundation for future community business planning. It identifies where further more detailed investigations and feasibility analysis could be undertaken.

1.2 Objectives

The overall purpose of the Cassiar TOS is to provide a description of practical and realistic tourism development opportunities in the region.

The specific objectives, as described in the September 8 1999 Terms of Reference, were as follows:

Inventory and Modelling

The existing Forest Recreation Resource Inventories and Tourism Resource Inventories will form the basis and starting point for this update. Although not the primary focus of this study, data collection and database updating is an essential component and efforts need to be made to ensure to most currently available data is obtained and used in the analysis. Data collection methods will include mail and telephone as well as personal interviews and group meetings. Coding sheets are to be provided by the Ministry. Facility and other commercial tourism information are expected to be gleaned from maps, guidebooks and Internet listings.

Data analysis will be done similar to past TRI and TOS product capability projects. A government/industry Advisory Group is expected to provide direction on the products to be modelled and on the criteria for evaluation. The products selected will represent the range of seasonal, setting and resource variations in the study area, but will focus on eco-tourism and soft adventure activities. Capability modeling will use Geographic Information System (GIS) overlay techniques to determine locations where resources exist to support the products being analyzed. The process will involve decision-tree schematic models to delineate areas of high, moderate or limited capability.

SWOT Analysis

A SWOT Analysis is to be used to assess the strengths, weaknesses, opportunities and threats of improving tourism in the area. This analysis is intended to identify how the community can:

- build on regional and community strengths
- overcome weaknesses that constrain tourism development
- approach tourism development to minimize the potential impact of external threats, and
- make the most of available opportunities.

Community Involvement

Including the interests and local knowledge of community representatives is important to the process. It is important to the process that the community has input to - and be in agreement with - the identified tourism opportunities. This community involvement is important as the community is expected to be a major user of the information, and they need to agree with the recommendations

Tenure

Tourism businesses operation on Crown Land in BC must have a Commercial Recreation tenure issued by BC Assets and Land Corporation. Many of the opportunities identified will utilize crown land and therefore must have a reasonable chance of qualifying for a CR tenure.

Community Tourism Development Profiles

The key output of the analysis will be a map and description of tourism development opportunities in the study area, and a summary of the barriers to be overcome to implement the project. To link the information to the communities, brief profiles will be prepared that:

- identify the most promising opportunities, and

- suggest how the communities could develop and benefit from the opportunities

1.3 Study Area

The study area is the Cassiar Timber Supply Area as designated by the Ministry of Forests. (This area used to be the Cassiar Forest District, but has now be merged with the Bulkley Forest District to form the Bulkley/Cassiar Forest District.) The area is situated in the northwest corner of the province in the Prince Rupert Forest Region. The study area is 13.4 million hectares in size and covers approximately one-sixth of the province. It is bounded on the west by Alaska, to the north by the Yukon, to the west by the Fort Nelson and Mackenzie timber supply areas, and to the south by the Prince George and Nass timber supply areas.

Early in the study process the northwest portion of the study area was excluded from the analysis. The area around Atlin was taken out because this area was the subject of a Commercial Recreation Management Plan (second draft dated November 10, 1999). The Tatshenshini-Alsek Wilderness Park was also eliminated because of its park status, its distance from a host community, and the limited opportunities for expanded commercial recreation and tourism.

Part way through the analysis (early February 2000), the Dease River Band (located at Good Hope Lake) requested that the Kaska traditional territory not be included in the study. This area includes much of the land north of the Cassiar Iskut-Stikine LRMP boundary. This request was granted which resulted in no specific opportunities being profiled for Good Hope Lake. Nevertheless, the resource analysis has been included as this mapping work was virtually complete by February 2000.

Key communities in the study area are Dease Lake, Iskut and Telegraph Creek.

1.4 Research Methodology

Completion of this project involved a combination of secondary source information and primary data from interviews, meetings and surveys. The process was facilitated by the existence of the Cassiar Iskut-Stikine Land and Resource Management Plan (LRMP) process. This process, which had been in existence for over two years at the start of our analysis, provided a number of background reports and maps. The LRMP area covers approximately five million hectares, corresponding roughly to the Stikine River watershed, overlapping the lower half of the Cassiar TOS study area.

Completion of the analysis involved a number of steps within a variety of separate topics. These are summarized as follows:

Background:

- Obtained available and relevant background reports and studies. (See Appendix C – Information Sources).
- Obtained all relevant NW TRI digital files from the 1996 inventory and cropped them to the Cassiar study area. (See Section 2.2.1).
- Prepared paper plots of all the coverages and models.
- Obtained the Data Dictionary of Land and Resource Management Plan (LRMP) data sources.

- Accessed and reviewed a number of LRMP reports from their web site.

Administration:

- Project signed and initiated approximately October 15/99
- Met with Land Use and Policy Branch personnel to discuss project start-up process, timing, meetings, information sources, methodology, etc.
- Formed a project Advisory Group from the Economic Planning Committee of the Cassiar Iskut-Stikine LRMP. This contains five persons (two industry and three government). Advisory Group consists of:

Dan Pakula	Riversong Lodge
Greg Drury	Iskitine Lodge
Mary Lou Malott	Ministry of Energy and Mines
Peter Levy	BC Parks
Fred Oliemans	Ministry of Forests

(In addition to this locally based group, the project was managed by Stephen Connolly, Ministry of Small Business, Tourism and Culture.)

- Met with the MSBTC representatives in late January 2000 to discuss progress.

Operator Information

- Obtained the 1996 operator listings for the study area from the NW TRI.
- Obtained the latest TOS standards and categories code book from MSBTC.
- Obtained the revised database format.
- Reviewed available guidebooks, directories, Internet listings, and Chamber of Commerce listings to update the inventory of operators.
- Contacted operators in person, by mail and by phone to update facility information.
- Entered data into a facility database.

Site Visit (November/99)

- Drove the study area corridor along Highway 37 from Bell II to Cassiar and Good Hope Lake, and to Telegraph Creek.
- Met with the Economic Planning Committee of the Cassiar Iskut-Stikine LRMP November 20/99. Discussed project and issues associated with data collection and analysis.
- Met with a number of tourism operators along the Highway 37 corridor to distribute operator questionnaires and discuss the project.
- Met with government agency representatives in Smithers to collect relevant information. These meetings included representatives of Parks, Assets and Lands, Mines, Government Agent, and Forests.

- Met with the Tahltan Joint Council Land Use Coordinator in Dease Lake, and with the Telegraph Creek band. Arranged to use the Dease Lake Office as conduit for native correspondence within the Tahltan Traditional Territory.

First Nations Contacts

- Initiated contact with first nations bands in the area. Contacts are as follows:

Band	Location	Contact
Dease River Band	Good Hope Lake	Chief Carol Ann Johnny
Iskut First Nation	Iskut	Chief Louis Louie
Tahltan First Nation	Telegraph Creek	Chief Yvonne Tashoots

- Contact was made by letter with the chiefs to explain the project and to invite participation.
- The Iskut and Tahltan First Nations are represented by the Tahltan Joint Councils located in Dease Lake. Contact with this group was maintained with the Land Use Coordinator.
- Chief Johnny of the Good Hope Lake Band requested that no analysis be made of the Kaska territory north of Dease Lake. This request was reviewed with the client and accepted.

SWOT Analysis

- Obtained information from a number of background reports on the strengths and weaknesses of the area.
- Obtained SWOT input from several operators via their questionnaire responses.
- Interviewed several tour operators who are active along the Highway 37 corridor regarding their perceptions of the area.

Product Modelling

- Accessed all the digital coverages from the NW TRI and clipped to this Cassiar study area.
- Printed plots of all coverages and product models from this source.
- Obtained the data dictionary and digital files for a number of relevant LRMP generated coverages.
- Obtained Forest Recreation Inventory data on Feature Significance, Recreation Opportunity Spectrum, and Management Class, and plotted output.
- Developed a product evaluation system for a range of land, water and snow based activities, which resulted in selection of seven commercial recreation opportunities.
- Prepared schematic models for seven products based on refinements of the Ministry's existing models and on the availability of data.

- Obtained more current biophysical digital data, as available, to run the models. Ran the models to product plots of areas of high, medium and low capability
- Reviewed the models with the MSBTC project manager, resulting in a number of suggested revisions. The models were re-run based on these revisions, and using local use input from selected operators and agency representative input.

Local Knowledge Input

- Interviewed several agency representatives in Dease Lake and Telegraph Creek, and in Smithers.
- Interviewed selected tourism operators (located both in the study area and in Smithers).
- Received input from Cassiar Iskut-Stikine LRMP Table members.

Site Visit (February 2000)

- A second site visit was made in mid February 2000 to present preliminary results of the analysis to the Advisory Committee.
- A presentation was made and a report tabled (Partial Draft dated February 7/00) to the LRMP Economic Planning Committee and the TOS Advisory Committee.
- Input was received on community profiles, tourism development opportunities, frontcountry and backcountry activities, and local versus non-local development.

2. Area Description

2.1 Area Profile

2.1.1 Biophysical

The topography of the area is characterized by a series of rugged mountains and plateaus separated by wide valleys and lowlands. Over two thirds of the area is tundra, rock and alpine and just over one-quarter is forested. The main biogeoclimatic zones include Alpine Tundra, Spruce-Willow-Birch, and Boreal White and Black Spruce.

All but the coastal mountains are located in the Northern Mountains and Plateaus Ecoregion. The key ecozones include the Teslin Plateau, Stikine Plateau, and Southern Boreal Plateau, plus the Tahltan Highland, Tuya Ranges, and the Cassiar Ranges. The most dominant river is the Stikine, while other major rivers include the Tuya, Iskut, Tahltan, Klappan, and Spatsizi Rivers.

The area hosts a range of wildlife species including grizzly and black bear, mountain goat, dall and stone sheep, moose and caribou. Other species of significance include fishers, wolverines lynx and wolf. Small mammals include collared pika, arctic ground squirrel, tundra vole and brown lemming. Bird species in the area include Pacific loon, gyrfalcon, lesser golden-plover, Arctic tern and northern shrike. Salmon are restricted to the Stikine, Taku and Tatshenshini watersheds. Freshwater fish include rainbow trout, Arctic grayling, Dolly Varden, lake trout, whitefish and northern pike. (Source: Cassiar Timber Supply Review, 1999.)

Temperatures vary significantly within this large study area. The populated areas of the region along Highway 37 have a continental climate. Summer temperatures are moderate ranging from 13 C to 22 C from May to September. Winter temperatures from October to April average -25 C, and typically with a three to five week period of temperatures around -40 C.

Many of the area's unique features and landscapes have been protected in two large parks - Mt. Edziza Park and Spatsizi Plateau Wilderness Park. Frontcountry parks are located at Kiniskani Lake and Boya Lake along Highway 37.

2.1.2 Communities

The Stikine Region (as the Cassiar Timber Supply Area is known) is unincorporated and is the only area in the province not part of a regional district. Only the southwestern portion of the study area is part of a regional district - the Regional District of Kitimat-Stikine based out of Terrace. The main population centres in the area are Dease Lake, Telegraph Creek, Iskut and Good Hope Lake. Brief profiles are provided below.

Dease Lake

Dease Lake is the main service and supply centre in the Stikine region. It is located on Highway 37, about a seven-hour drive (600 kilometres) north of Smithers and/or Terrace. It is located 230 kilometres south of the BC-Yukon border and is also a seven-hour drive from Whitehorse. It has a population of approximately 600. Dease Lake originally developed as a Hudson Bay trading post in the late 1830s. With the discovery of gold in the north, Dease Lake became a staging and supply centre.

In the absence of a local or regional government, Dease Lake is the regional centre for many provincial government services using the government agent's office. In addition to the normal government agent services, the Dease Lake office provides ICBC services, takes utility payments, provides notary public services, and provides banking services (run by the Toronto Dominion banking agent). Dease Lake has an RCMP detachment, a library, a health centre, and Northern Lights College.

Iskut

Iskut is located about 100 km south of Dease Lake and 250 km north of Mesiadan Junction. It has a population of about 375 persons. Iskut acts as a staging area for independent and guided trips into the Spatsizi Wilderness Park and Mount Edziza Park. There are also a number of guest ranches and wilderness resorts located in the surrounding area.

Telegraph Creek

Telegraph Creek is located 112 km west of Dease Lake on a terrace above the Stikine River. It has a population of about 450 people. The town was originally built at the head of navigation for riverboats on the Stikine River and acted as a supply centre. It has a historic townsite with several well-preserved heritage buildings. It serves as a staging area for river recreation as well as for other types of wilderness tourism activities.

2.1.3 Socio-Economic Characteristics

Population

Population of the area is estimated to be about 1,500 people. This includes the communities listed above and other small hamlets and settlements mainly along the Highway 37 corridor. The population has increased slightly since the early 1990s after suffering a major drop in population with the closing of the mine in Cassiar in 1992. It is estimated that First Nations make up about 60% to 65% of the population. (Source: LRMP Socio-Economic Base Case)

Employment and Labour Force

About a third of the labour force is employed in the goods producing sectors including mining, construction, fishing and logging. (It is noted that mining represents the largest single employer but many of the employees are not area residents.) The largest employers in the service sectors are government, education, health and tourism. (Source: LRMP Socio-Economic Base Case) Average incomes are slightly lower than the BC average (BC Stats, 1996 latest figures available)

Major Employers:		
Public Sector	School District #87	21
	Provincial Gov't	23
	Health Centre	12
	Tahltan Development Corp	9

Private Sector	Eskay Creek Mine	217
	Golden Bear	30
	Cassiar Mining	22
	Emcon Maintenance	38
	Band Councils	35
Utilities:		
Electrical Power	BC Hydro from diesel generated plants in Dease Lake, Telegraph Creek and Iskut. The Tahltan Development Corporation is developing the Hluey Lakes Micro-Hydro Electric Dam to supply hydro electric power to these three communities.	
Telephone	Operated by NorthwesTel out of the Yukon	
Media:		
Newspapers	Terrace Standard and Vancouver Province and Sun at SuperValu	
Radio Stations	CBC, CFFM, Northern Native Broadcasting	
Television	CBC, BCTV and Satellite dish	
Business Services:		
Chamber of Commerce	Dease Lake and Tahltan District Chamber of Commerce.	
Approx. 15 businesses	Accommodations, Food and Beverage, Automobile fuel and services, Groceries, Hardware and Souvenirs	
Government:		
Federal Government	Weather Station	
	Canada Post	
	Royal Canadian Mounted Police	
Provincial Government	Many government services provided by Government Agent	
Regional Government	Regional District of Kitimat-Stikine responsible for the southern portion of the area	
Community Services		
	Health clinic, Library, Northern Lights College, Banking Services	

2.1.4 Tourism Profile

Recent analysis conducted for the LRMP process has provided some background information on the status and significance of tourism. These reports are:

- Economic Opportunities and Barriers Study. (June 1998)
- Socio-Economic and Environmental Base Case. (December 1998)
- Economic Strategy (Draft). (May 1999)

Although some discrepancies exist, the studies demonstrate the significance of tourism to the area. The studies estimate the tourism employment at between 125 and 200. These include all tourism related jobs (direct, indirect and induced), and include full and part-time jobs. Approximately half of this employment is made up of residents.

The study area is characterized by a huge expanse of land (one-tenth of the province's land mass) with a very small population (about 1,500). Two distinct types of tourism and tourism facilities also characterize the area. These are frontcountry or highway oriented facilities, and backcountry or wilderness operations. The frontcountry operations include lodges and motels, restaurants, campgrounds and gas stations. They cater to the through traffic on Highway 37.

The area has extensive wilderness, with primitive or semi-primitive non-roaded recreation land comprising over 95% of the area, based on the MoF Recreation Opportunities Spectrum. The area includes wild rivers, mountain and valley scenery, and some of the best big game hunting in North America. These resources have provided for a strong nature-based tourism sector.

There are about 25 guide territories in the study area (including partial areas split by the study area boundary). These territories include grizzly bear, black bear, caribou, cougar, mountain goat, deer elk, moose, mountain sheep and wolf. There are several dozen fishing guides who have angling quotas in area's lakes and rivers. Fishing experiences range from fly-in fishing lakes for trout to salmon fishing in the Stikine River.

A survey was conducted of LRMP plan area operators, as part of the Economic Opportunities Study, early in 1998. This survey involved input from 13 operators, not including guide-outfitters and fishing guides. Although the sample is small, it likely represents about half of the tourism related businesses in the area. Also, the LRMP area is smaller than the Cassiar Timber Supply Area (less Atlin and areas west) so the results will somewhat understate the status of tourism for our study area. However, the recent timing of the study (less than a year old) and the direct tourism focus make it a useful source. It provides the following information.

Type of Operation	In spite of the small number of operators in the area, a range of tourism services is provided. These include accommodation, food and beverage, resorts/lodges, river tours, land based tours, fishing and cycling.
Years of Operation	Half of the respondents had been operating for < five years.
Employment	Estimate of 125 jobs representing 28% of total employment. Not this includes all tourism related businesses including guide-outfitters and support services.
Recent Growth	Most operators reported moderate or steady growth over the 1990s with a few experiencing very rapid growth.
Future Growth Outlook	Most respondents expected continued growth, although

	outlook was tempered with concern about a number of issues.
Factors Determining Growth	A range of concerns were expressed including: upgrading Highway 37, better community services and infrastructure, protection of wilderness, improved access to protected areas, and growth in resource industries.

Source: Socio-Economic Base Case. Gary Holman and Eliot Terry. 1998. Appendix B – Summary of Tourism Survey.

2.1.5 Future Outlook

Socio-Economic

Future outlook is a function of population growth and economic development. The LRMP reports mentioned above provide some forecasts on likely futures for the study area.

The rate of population growth is expected to be slow to moderate over the foreseeable future. Forecasts conducted by BC Stats for the Stikine and Telegraph Creek Local Health Areas show moderate growth for the Stikine region and slow growth for the Telegraph Creek area. (It is noted that these two areas cover a larger area than the Cassiar study area.)

Year	Stikine Health Area	Telegraph Creek Health Area
1999	1,305	615
2005	1,673	630
2010	1,991	688
2015	2,329	771
2020	2,668	841

Forestry activity has declined recently but is forecasted to expand. This will depend on market prices and timber availability. Mining is also expected to increase, based on likely increase in commodity prices, and based on the historic volume of mining activity in the area. Population growth is also expected to drive an increase in locally provided services, and in the provision of community facilities and infrastructure.

Implementation of the LRMP and resolution of First Nations claims will have significant impacts on the area's economic health. These issues are important, as they will provide more certainty on the use of the land base.

Other factors of importance to continued development of the area are continuing improvement in Highway 37 and the provision of hydroelectric by BC Hydro.

Tourism

Historical growth in tourism is expected to continue (Socio-Economic Base Case). This growth is anticipated for two reasons:

- increases of highway oriented traffic, and
- the quality and significance of the wilderness, scenery and wildlife resources.

Highway traffic is expected to include increased volumes of independent travellers, tour groups, and persons accessing the backcountry. The wilderness features are expected to become relatively more significant over time if the quality of backcountry resources declines in other areas of BC and North America.

The study conducted for the *Socio-Economic Base Case* report of tourism operators indicated a strong interest by operators to expand their operations. The *Economic Opportunities Study* identified several tourism development projects that offer potential. Development of these projects would expand the tourism facility base. An illustration of future development of resource based tourism is the current expansion of Last Frontier Heli-Skiing. They are expanding their base of operations at Bell II and are expected to construct a remote mountain lodge. Several years ago, this would have been considered an unlikely development.

Recreational and sport commercial fishing could expand in the future but this is dependent on the health of the resource. Resource expansion will require habitat improvement and resolution of the salmon treaties with the United States.

2.2 Mapped Information

2.2.1 Northwest Tourism Inventory Mapped Data

A resource inventory was conducted for the Cassiar area in 1996. This was the Northwest Tourism Resource Inventory, which included the Cassiar region as part of the larger Prince Rupert Forest Region. This digital information was obtained from the MSBTC from the files provided by Clover Point Cartographics. The following map files were obtained:

<u>Base Data</u>	<u>Existing Use</u>
Boundary	Air bases
Lakes	Scenic resources
Rivers	Operator facilities
Slope and Elevation	Camps
Communities	Features
Roads	Routes and Trails
Parks	Use Areas
Heritage Features	Viewscapes
Biogeoclimatic	
Guide-Outfitter Areas	

Intermediate Analysis Maps

Biogeoclimatic Zones
Scenery Models (front country and backcountry)
Slope
Wildlife Viewing
Feature Models (winter, summer, wildlife)
Existing Use Models (wildlife, fish, raft, water features, roads, urban areas, ski areas)

Capability Models

Backcountry skiing
Snowmobiling
Hunting
Wildlife Viewing
Freshwater Fishing
River Rafting
Hiking/Backpacking
Trail Riding
Road Touring

2.2.2 Cassiar Digital Data

As part of our analysis additional digital information was obtained to update the above files and to create new mapped information. The updates and new information were obtained to drive the capability models prepared as part of this project. (See Section 3.4)

The new data acquired is as follows:

Map Topic	Description
Biophysical habitat mapping	Six classes of wildlife habitat from high to nil. Several species including deer, mountain goat, caribou, moose, elk, bison, grizzly and black bear.
Watershed Atlas data	Mapped information on aquatic features. Based on NTS map series.
Fisheries Inventory Summary System	Inventory information stored as separate features, which can be linked to the watershed atlas data. Presence or absence of fish noted either as points or zones. Information portrayed in model for salmon, sport fish and other.
Forest Recreation Inventory	Recreation Opportunity Spectrum Recreation Features Significance Management Class
Boundary	Forest District and Study Area boundary

Slope	0 to 20 degrees 21 to 40 degrees Greater than 40 degrees
Aspect	North = 315 to 345 degrees South = 135 to 225 degrees
Alienated Lands	Lands, which are wholly or partly under private ownership.
Viewscapes	Important viewscape information from MoF..
Local Knowledge	Non-Tahltan information on significant features.

It is noted that mapped information on Tahltan trails and other local knowledge issues was produced for the LRMP process, but was not available for our purposes.

2.3 Tourism Facilities

2.3.1 Information Collection Process

A requirement of this project was to update the list of tourist facilities in the study area. Due to the area's remote location and the small population, there are a limited number of tourist facilities and tourism operators. Several surveys have been conducted of operators in the Cassiar study area in recent years, including:

- Tourism Resource Inventory 1996
- Economic Barriers and Opportunities Study 1998
- Socio-Economic and Environmental Base Case 1998

For our purposes, the database of facility operators in the Northwest region was obtained from the MSBTC and the businesses located in the Cassiar study area were clipped out of the listing. During the November 1999 site visit, many of the operators along the Highway 37 corridor were visited. Those businesses that were open were interviewed and given a survey form to complete. The businesses that were not visited were mailed a questionnaire. Reminder phone calls were made to encourage operators to complete the survey.

In spite of personal visits and reminder phone calls, questionnaire returns were poor. A total of about 25 questionnaires were distributed. - six were returned. Information from these facilities, plus details about other facilities in the region clipped from the 1996 NW Tourism Inventory, have been entered into the revised facilities database. (This database developed by the MSBTC, was revised in January 2000.)

2.3.2 Facility Descriptions

The study area has a small number but a broad range of facilities either oriented to tourists or used by residents and tourists. The main facilities are as follows:

Accommodation

Dease Lake:

Northway Motor Inn
Arctic Divide Inn
North Country Inn
Dease Lake RV Park

Iskut:

Mountain Shadows Guest Ranch
Bear Paw Resort
Willow Ridge Resort
Red Goat Lodge
Black Sheep Motel
Iskutine Lodge
Tatogga Lake Resort

Telegraph Creek:

Stikine Riversong Lodge
Glenora Guest Ranch

Food and Beverage

Several restaurants and eating establishments exist in the area; many are seasonal.

Transportation

Air:

Northern Lights Air

Automobile:

Chico's Repair
Chucky's Towing
Sharko's Auto Repair
Dease Lake Shell
Marion Bros. Enterprise

Retail:

Macleod Mtn. Supplies
Rick's Outdoor Equipment
More than Hobbies
The Trappers Den Gift Shop
Super Valu
Beulah's Jade
North Country General Store
Teddy Bear Outpost
Stikine Rivesong General Store
Trappers Souvenirs

In addition to the above facilities, there are a number of Guide-Outfitters and licensed fishing guides, either resident in the area or operating in the region. The entire Cassiar study area has twenty complete Guide Outfitters territories and three partial territories. Three of these territories are in the Atlin area, and ten (complete and partial) are in the area north of the Cassiar Iskut-Stikine LRMP. Species vary by territory but include black bear, grizzly bear, caribou, deer, elk, moose, mountain sheep, mountain goat and wolf.

A number of fishing guides are also active in the area. These guides apply for and are granted a certain number of angler days for particular bodies of water. According to representatives of the Fisheries Section of the Ministry of Environment, Lands and Parks, most of the rivers and lakes in the Cassiar region have some amount of guided angling activity. For illustrative purposes, we have obtained information on guided fishing activity on the main bodies of water in the region. The following is a listing of the number of guides operating on several rivers and lakes, and the number

of angler days they are licensed for. The numbers vary considerably from year to year and the largest number of angler days is quoted below from the period 1995 to 1999 (in alphabetical order).

Water Body	Number of Guides	Number of Angler Days
Chutine River	3	130
Craig River	8	415
Cry Lake	4	255
Eddontenajon Lake	4	110
Dease Lake	7	230
Dease River	8	505
Iskut River (Upper)	10	315
Kiniskan Lake	6	235
Scud River	3	140
Stikine River	9	400
Stikine River (D/S Telegraph)	1	100
Tahltan Lake	4	290
Tahltan River	10	610
Tatogga Lake	3	50
Tumeka Lake	5	100
Unuk River	7	240

2.4 Strengths, Weaknesses, Opportunities And Threats (SWOT)

2.4.1 The Process

A SWOT Analysis is a business research technique used to assess development opportunities. It focuses on the features and attributes of an area and defines their scope and merits. It identifies physical and economic factors that either help or hinder development of individual opportunities. The process provides a framework for conducting the opportunity analysis.

It is important to note that this SWOT analysis is focused exclusively on tourism development. That is, factors that may be a community or regional issue but do not relate directly to tourism development have not been included. The following is a description and definition of the four components of a SWOT analysis.

Strengths	The features or attributes of the area that make it appealing to tourists. These are the physical strengths that could facilitate development of specific tourism developments. It also includes the social, administrative, infrastructure and community strengths.
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Weaknesses	The factors or conditions that hinder the development of tourism. Weaknesses include conflicts with existing use which range from incompatibility between tourism operators, between tourism and recreation, and between tourism and resource industries. It also includes a lack of community support, and a lack of facilities and/or infrastructure.
Opportunities	The general and specific tourism developments that result from the assessment of strengths and weaknesses. These opportunities are based on resource capability, plus market and financial feasibility.
Threats	Outside factors over which the agency or business has no control. These issues usually involve topics such as resource management and financing.

Our information has come from a number of sources. These include background studies - particularly the LRMP Economic Opportunities and Barriers study and the Socio-Economic Environmental Base Case - questionnaire responses from tourism facility operators, and observation of the analysts.

2.4.2 Strengths

Tremendous Natural Resources

The area has a large volume and large variety of high quality natural resources. These resources include a combination of wilderness and scenery, and fish and wildlife resources. The quantity and quality of these physical resources are of national and international significance and are by far the area's key strengths.

The Stikine River: Identified as the top candidate for heritage river designation in Canada, and nominated for designation as a Canadian Heritage River. Parks Canada has identified the Grand Canyon of the Stikine as a natural site of Canadian significance. The river also received the highest recreation rating in the province in a study done for the Ministry of Forests (Preliminary List of Significant Rivers).

Wildlife: The area has some of the province's (and North America's) largest concentrations of big game animals. The list includes grizzly bear, black bear, mountain goat, dall and stone sheep, moose, deer and woodland caribou.

Fish: The area has an abundance of fish in both lakes and rivers. Fish resources include salmon, trout and other northern sport species.

Wilderness: With the exception of the Highway 37 corridor (and the link of Telegraph Creek) much of the area is unroaded wilderness. Due to limited forestry activity, few roads exist

Provincial Parks

The region has two of the provinces largest parks, both of which protect very unusual physical features.

Mt. Edziza Park: This park encompasses 230,000 hectares of the Tahltan Highlands, west of the Iskut River and north of the Stikine River. It is one of the most significant volcanic areas in Canada, containing lava flows, basalt plateaus, and cinder cones.

Spatsizi Plateau Wilderness Park: This vast park is 675,000 hectares in size and is the second largest in the BC Parks system. It spreads across the Spatsizi Plateau and the Skeena Mountains, and is home to many big game species.

History

First Nations Culture: The two first nations peoples in the study area are the Tahltans and the Kaska. The Tahltan territory occupies much of the study area, straddling both sides of Highway 37. The Kaska territory is located in the northeast portion of the Cassiar region. (Source: First Nations Peoples map)

Many of the resident Tahltans currently live in Dease Lake, Iskut and Telegraph Creek. Traditional activities included hunting and fishing and trading with neighbouring native groups. Tahltans are currently involved in forestry, construction, road maintenance, retail, fishing and guiding. The band administers health, housing, education and social assistance programs, as well as provision of mail service, fire protection, policing and utilities.

Non-Native History: The area has had a unique blend of resource development oriented history. These include a vigorous fur trade through the 1800s, the Collins Overland Telegraph line to Siberia in 1866 and the Yukon Telegraph Line to Quesnel in 1901, Canadian route to the Klondike gold fields in the Yukon in 1899, and gold discoveries and the associated gold rushes in 1863 and 1873.

Transportation

Highway 37: Highway 37 is an all season road connecting the Cassiar region with central British Columbia and the southern Yukon. The route consists of mainly hard surface (215 km of pavement and 400 km of seal coat) and about 100 kilometers of gravel. It bisects the region and provides an alternative connection between the Yukon/Alaska and BC, to the Alaska Highway.

Average annual summer two-way traffic range between 400 and 800 vehicles, averaging about 500. Average year-round traffic flows are about 330 vehicles per day. Tourist traffic represents about 60% of summer traffic and about 25% of year-round traffic. Traffic fluctuates from year to year, but there has generally been no growth. About half of the traffic is BC residents, and most of the remainder is from the US. (Source: Economic Benefits Generated by Improvements to Highway 37)

Scheduled air service: Scheduled air service is available connecting Dease Lake with Smithers in the south and Watson Lake in the Yukon. Northern Lights Air operates a Monday/Wednesday/Friday service year-round.

2.4.3 Weaknesses

Transportation

Condition of Highway 37: Although Highway 37 is an all-season road link between central BC and the Yukon and Alaska, it requires regular and costly maintenance. It also has about 100 km of gravel. The gravel and the variable condition of the hard surfaces are a negative as far as road-based tourism is concerned.

Lack of public transit and transportation options: The only ways to access the area are by private vehicle (car, truck or RV) and by air. There is no public transit (bus), nor rail or water access.

Population Base and Social Structure

Small population: The area covers a large geographic area and has a very small population. This small population provides a small pool of potential employees for tourism businesses.

Lack of entrepreneurial skills: The area is reported to have a lack of people with entrepreneurial interests and skills. This is partly a function of the small population and partly the remote location.

Community Infrastructure

Lack of land for development: There is very little private land available for sale for tourism development. This includes the communities of Dease Lake and Telegraph Creek, and the non-urban areas.

Lack of hydro-electric power: Power is generated in the three communities of Dease Lake, Iskut and Telegraph Creek by diesel generator. The remoteness of the area has restricted the opportunity to be connected to the BC Hydro grid.

No local government: The Cassiar area has no local government and all political decision are made in Victoria. The communities are not incorporated and most of the area is not a part of the province's regional district system of government.

Very few community facilities: The small size of the communities limits the range of services available to both residents and tourists.

Lack of community stability: Historic dependence on mining and the cyclical nature of mining has limited the stability of the community from an economic and job creation perspective.

Tourism Issues

Highly seasonal tourism market: The area has a short traditional summer warm weather period due both to the northern latitude and the altitude. The long winter period also limits the market.

Small market base: The pass-through market is limited to a few hundred vehicles a day, most of which are enroute to/from Alaska. The destination market is limited by the small number of attractions, accommodation facilities, and activity products. (This market driven issue can be stated as a product weakness as well.)

Limited number of tourism facilities: The entire area has only a few motels, inns or lodges; even a smaller number of eating establishments; no commercial attractions; and no tourist oriented events or festivals. (The area does have a proportionately large number of Guide Outfitters and fishing guides.)

Weak tourism marketing: The small number of tourism facilities and the small market base has meant the area has not been highly profiled as a tourism destination.

Lack of visitor statistics: Low visitor volumes and the small number of tourist facilities has lead to poor statistics and performance monitors.

2.4.4 Opportunities

Tourism development opportunities can be grouped into categories by type of development, by market, and by geographic location.

Opportunities by type

Land Based: Tourism development opportunities having potential based on land resources include such activities as hiking, hunting, trail riding, and wildlife viewing.

Snow Based: Tourism development opportunities having potential based on snow resources are heli and cat skiing, cross-country skiing, ski touring, and snowmobiling.

Water Based: Tourism development opportunities having potential based on water resources are canoeing, kayaking, rafting, river touring, fishing and wildlife viewing.

Opportunities by market

Pass-through market: There is a steady flow of summer tourist traffic along Highway 37 amounting to a "few hundred" vehicles a day (two-way traffic). This includes automobiles, RVs and motor coaches.

Destination markets: The study area is not known as a destination area except for a few specific commercial recreation activities. The main activity markets currently destined to the study area are restricted to hunters, fishermen, hikers and people taking river trips/tours.

Opportunities by geographic focus

Frontcountry opportunities: These developments would cater to persons passing through the area and those staying in the main communities. These developments would be easily accessible and cater to a range of geographic markets and interests.

Backcountry opportunities: These developments would cater to specialized and dedicated markets in the non-roaded portions of the study area.

2.4.5 Threats

Availability of land

Completion and implementation of the LRMP process recommendations: At the time of writing the Cassiar Iskut-Stikine LRMP was nearing completion. (The northern portion of the Stikine region was not part of the LRMP process.) Implementation of the table's recommendations will add a level of certainty to future land developments.

First Nations land issues: Resolving first nations land related issues will also add to the certainty of future land based developments.

Preserving access to land for use by tourists and commercial recreation operators: Ensuring access to parks, rivers, lakes and future First Nations lands for commercial recreation purposes.

Access

Highway 37 Improvements: Although costly for the number of residents and volume of traffic served, continued maintenance and upgrading of Highway 37 is crucial to an expanded tourism industry. Promoting the link to the Nass Forest Road at Cranberry Junctions would provide travellers with a touring option.

Air access: Air access exists but is limited to every-other-day scheduled service (to Dease Lake) and float plane access to the areas lakes.

Climate and weather: The area has a short summer and long cold winter, both of which limit access and volumes of visitors.

Resource Use Conflicts

Tourism and other resource industries: Conflicts between tourism use of the land resource and mining and forestry uses.

Commercial tourism and local recreation: Conflicts between commercial users of the land base and independent tourists or local recreationalists.

Protection of the wilderness resource: The area's biggest single asset and market draw is the wilderness.

Development Obstacles

Access to financing: The remote location of the study area and the highly seasonal markets impact project viability and access to commercial financing options (both debt and equity).

Limited political influence: The very small population base and the lack of local or regional government representation limits access to government assistance programs.

Lack of relationships between local residents and outside investors: Expansions of existing tourism businesses and development of new facilities, based on the identified opportunities, would be facilitated by these partnerships.

3. Tourism Product Analysis

3.1 Product Selection Process

Determining which products offer the greatest potential opportunity for development was made by the analysts. The selection was made based on input from existing tourism operators, from agency representatives, and from the project Advisory Group. To facilitate the selection process a system was used to compare and rate product development potential.

The system was intended to evaluate tourism products/activities against a series of criteria. It was intended that those products/activities that were - based on high quality resources, had market potential; and generated economic benefits to the community - would form the basis of the opportunity analysis. This process was designed to be rigorous and defensible, while being consistent among the range of products.

The evaluation matrix rated 25 tourism products grouped under the following headings:

- Snow-based
- Water-based
- Land-based
- Touring
- Services

Each of these products was rated against resource, market, and community criteria, using a scale of zero to four, where:

- 0 = N/A
- 1 = Poor
- 2 = Average
- 3 = Good
- 4 = Excellent

This process attempts to numerically rate each tourism product on a five-point scale, based on the knowledge of the topic by the analyst. Although this process relies on the judgment of the evaluator, it allows a great deal of information to be summarized very concisely. A description of the criteria used for the evaluation is presented in Table 3-1.

Each product was put through the evaluation and the numbers totalled for each row. (See Table 3-2.) The higher the number, the "better" the possible tourism potential for each product. It is important to note that all twelve evaluation criteria (column headings) are unweighted meaning all topics are deemed to be similar in importance. This was done intentionally so as not to skew the evaluation towards any one product or group of products.

Table 3-1
Definitions of Tourism Product Evaluation Criteria

Evaluation Criteria	Definition
<i>Resource Criteria:</i>	
Quantity	The extent or amount of the resource to support each product.
Quality	The quality of the resource from an activity or tourism perspective.
Accessibility	The ease with which the product can be accessed relative to distance, safety, terrain and parking.
Seasonality	The number of months or seasons during which the product can be utilized.
<i>Market Criteria:</i>	
Existing Market	The importance of the product relative to the area's existing tourism market.
Trends	Consideration of local/regional/national trends in activity participation.
Market Potential	The potential of the product to attract visitors or increase length of stay based on consideration of resource quality, existing market profile and market trends.
Geographic Origin	The number of visitor markets to which the product appeals. For the purposes of this analysis, the four market categories include: B.C.; Regional (border states and provinces); North American long haul; and International.

Evaluation Criteria	Definition
<i>Economic Criteria:</i>	
Job Creation	The likely job creation potential associated with expanding the market for each product.
Job Duration	The duration (in weeks/months of the year) of jobs created to support each product. (Should be similar to resource seasonality.)
Tourism Revenue	The amount of revenue generated (or the amount of money spent) by tourists, to participate in the activity.
Employment Income	The contribution of the product to the generation of employment income based on direct and spin-off job creation.

See Table 3-2

Tourism Product-Market Match Evaluation Matrix

3.2 Tourism Product Selection

The Study Team reviewed the list of 25 products to determine which ones should make up the products to be modelled. It was considered important to develop a process for the selection of these products to ensure that effort was expended on the "best" or most viable products.

Input was also provided by way of a numeric rating by members of the Advisory Committee. This input was intended to focus the opportunities on those products that best met the "vision" of the tourism development within the LRMP process.

The Product-Market Match matrix was an attempt to assess, in a systematic way, subjective information about each product. The numeric totals indicated the products that might offer the highest potential to increase tourism activity in the area. Those with the highest values were reviewed by the analysts. These include a variety of land/water/snow based products; frontcountry and backcountry opportunities; and those deemed to offer the most short and long term potential.

The top seven selected products are as follows (in alphabetical order):

- Freshwater fishing
- Hiking
- Lodges
- River Recreation

- Ski touring
- Vehicle Touring
- Wildlife Viewing

A series of criteria were considered in order to determine the most suitable products to model. The issues were:

- potential job generation (i.e., the number and seasonality of jobs that could be created, both directly and indirectly)
- business development opportunities (i.e., the ease with which the product can be put into place)
- future outlook for the product (i.e., where the product is in the product lifecycle - emerging, growing, maturing, declining)
- quality and quantity of the resource (i.e., how good the resource is and its competitive advantages)
- data needs (i.e., the data that is needed to run the models)
- data availability (i.e., the data that is available to run the models)

The following table (Table 3.3) charts information on the seven products.

Table 3.3

**Cassiar Region Tourism Inventory
Product Selection Evaluation Matrix**

Product	Score	Rationale	Data Needs	Data Availability
Freshwater Fishing	27	Numerous fish bearing lakes/rivers Variety of species including salmon and other sport species	Location information be concentrations and species	DFO and MELP information on species by location
Hiking	24	Numerous trails. Historic linkages. Front and backcountry trails	Location of existing and historic trails	Scenic, terrain and biogeoclimatic features suitable for hiking. Limited information on actual trail locations
Lodges	31	Combination of resources to support lodges. Numerous front and backcountry opportunities	Information on resource features of importance to lodge development	Lakes, proximity to Highway 37, slope and access

River Recreation	29	Numerous rivers suitable for a variety of activities. River rafting, floating, canoeing, kayaking	Information on suitability of rivers for various kinds of river recreation.	Scenery and rafting features, plus anecdotal information
Ski Touring	21	Excellent terrain for ski- touring	Snow conditions, slope and aspect	Scenic and backcountry skiing features, plus slope and aspect
Vehicle Touring	31	Variety of land and water scenery Broad market appeal. Tour development opportunities	Location of roads for tourism	Location of Highway 37
Wildlife Viewing	34	Very popular activity. Growing rapidly. Excellent water resources. Good land resources. Reasonably easy to develop.	High capability wildlife habitat, by species	High capability wildlife habitat for key big games species, plus anecdotal information

3.3 LRMP Product Considerations

The planning table for the Cassiar Iskut-Stikine LRMP developed management direction to provide greater certainty for local economic development, including resource-based industry and tourism operations, and as well as the maintenance of ecological values. These recommendations were developed with a commitment to balance the economic, environmental and social needs within the planning area, the region, and the province.

The objectives and strategies developed, when approved by Government, will provide policy direction to all provincial agencies in approving and planning future resource management activities in the LRMP area.

The LRMP planning table developed three categories of management direction. Taken together, these reflect the vision for land and resource management in the Cassiar Iskut-Stikine LRMP area. The categories of management are:

- General Management Direction;
- Area-Specific Management; and
- Protected Areas

Objectives and strategies providing General Management Direction for seventeen resources and resource values have been established that apply throughout the LRMP area, outside of Protected Areas. General Management Direction applies to all values and resources on provincial Crown land and is a baseline for management.

In addition, the planning table has identified fourteen zones for Area-Specific Management, which is distinct with respect to biophysical characteristics, resource issues and management direction. Activities within Area-specific Management zones are guided by objectives and strategies that reflect the specific values in each zone. General Management Direction also applies in Area Specific Management zones, unless otherwise indicated in the direction given for each zone.

A separate set of objectives and strategies has been developed for the fifteen Protected Areas that have been identified for the plan area. There will be no logging, mining or hydroelectric development within Protected Areas; other resource uses may or may not be permitted. (Source: Draft Recommended Management Direction Cassiar Iskut-Stikine LRMP: March 2000)

Members of the Advisory Committee strongly held the position that future tourism development should be locally based. This opinion follows from the LRMP vision statement, and direction from the Economic Strategy (draft). The vision statement is as follows:

"The LRMP will contribute to a healthy, productive and sustainable wilderness environment, a thriving and diverse economy, and strong communities supporting a wide range of local employment and lifestyle opportunities." (Source: Cassiar Iskut-Stikine Draft Economic Strategy)

Stated goals intended to attain this vision (pertinent to tourism development) are:

- Sustainable natural ecosystems
- Abundant fish and wildlife
- Jobs for local people
- Entrepreneurial capability
- Local benefits from resource development and extraction
- A diversified economic base

3.4 Product Information Sources

The following product descriptions include information on the general locations that are considered suitable for these activities. The list includes a combination of computer modelling results, direction provided by the LRMP process, and local input.

Computer Modelling

Geographic Information System (GIS) computer modeling is a product assessment technique based on the significance of the resource. The process utilizes a variety of spatial information sources available as digital files. Data requirements for each model were derived from earlier off-the-shelf models developed by MSBTC over the last few years. These models were revised for this study based on the availability of new or updated digital information. Schematic flow charts of the data sources and the linkages are presented in Appendix D.

LRMP Direction

The LRMP process created a number of zones grouped into 5 categories. The categories were:

- Exiting Protected Areas

- General Management Direction
- General Management Direction plus Area specific direction
- Recommended Protected Area with Access
- Recommended Protected Areas

Tourism and recreation opportunities have been suggested in the interim management direction documents.

Local Input

Local input was received from a few persons who were either operators active in the area, or government agency representatives. It is noted that exiting tourism operators were generally very reluctant to share information on their use areas. This concern was based on uncertainty about what would be done with the information, and who would have access to it. Local operators were strongly of the opinion that tourism should be development by local residents. In spite of this problem, we did obtain some mapped information on existing areas of use and/or high resource value areas for particular activities.

3.5 Product Modelling Analysis

Several data sources were used for the modeling process, including data collected from the 1996 Tourism Resource Inventory as well as data collated through the LRMP process in the area. The models below are primarily modifications on existing models developed for this region through the 1996 NW Tourism Inventory and the 1998 Kalum Tourism Opportunity Study.

Fishing

The Fisheries Information Summary System (FISS) data was obtained for all of the watersheds found within the study area. This data is in the form of both points (discrete locations such as hatcheries) and zones (more general areas of known fish distributions). The latter data was linked to the British Columbia Watershed Atlas data. The model for sport fishing capability is simply based on the presence or absence of three particular fish groupings: salmon, sport fish, and other (non-sport fish species). The data was transferred to the B.C. Watershed Atlas planimetry in a hierarchical fashion - with salmon superseding sport and sport species superseding other species in the instance where data for more than one group has been recorded against a stream reach.

Hiking

Slope has been used to restrict areas, however the model is largely driven by biogeoclimatic information (BEC) and by the scenic features. Both of these last two inputs were taken from the 1996 NW study.

Lodges

A preliminary coverage was generated which identified feature capability to support resort development. This coverage was used as an enhancement to site location factors because the types of features considered to support resort development such as marinas and golf course, do not exist in this area. Modelling was primarily driven by proximity to Highway 37 and large lakes (primarily considered sites for front country lodges). Areas of high capability within these buffers needed a southerly aspect and slope, which were less than 40 degrees. Moderate areas had the same criteria applied to them however they were not restricted by aspect. Areas which were not found within

the highway and large lake buffers but which had favourable slope and aspect qualities were given low capability (primarily considered sites for backcountry lodges). Areas with slopes greater than 41 degrees or which were covered by ice, glacier, lake or areas that are urban, industrial or park was assigned no capability.

Ski Touring

This model is almost identical to the NW model, with the exception of the slope and aspect data. Areas of north aspect and slopes between 20 and 40 degrees were selected as ideal locations for this activity. All of the inputs for this model came from the NW inventory, with the exception of adding, as one of the criteria, for assigning no capability. Additional features for backcountry skiing were taken from the forest recreation data as well.

River Recreation

This model is based on the 1996 NW Inventory Model. The only major difference in the model is the use of the 1:50,000 planimetry from the B.C. Watershed Atlas and these have been buffered accordingly. Also additional information on existing use was gleaned from the forest recreation data and from local use information.

Road Touring

This model involves only the presence or absence of paved roads where two wheel drive road touring would be possible. Other roads (obtained from the Ministry of Forests) have been included on the model plots as contextual information only.

Wildlife Viewing

Known wildlife viewing features guided the modeling of wildlife viewing. These known features included wildlife corridors, parks, existing use areas for wildlife viewing, and biophysical habitat capability data for a number of key wildlife species in the area. Areas of very high capability were determined by the presence of wildlife viewing features and areas of existing wildlife viewing capability, from the forest recreation inventory data. Areas of high wildlife capability were determined by the presence of known wildlife viewing scenic corridors (as flagged in the 1996 tourism resource inventory) and high rankings for front country scenery. Moderate capability was assigned to those areas possessing known wildlife viewing features which are not captured in the high and very high categories. Low capability on the other hand is assigned to areas with no known wildlife viewing features. Urban and industrial areas are nulled out in the model.

4. Market Analysis

4.1 General Trends

Tourism is a relatively young industry in Canada and BC. It is only in the last 50 years that tourism has become a mass market and family oriented activity. Over this period, but particularly in the last two decades, tourism has changed dramatically in BC. In one generation tourism has evolved from a predominantly summer activity typically involving camping, beach activities, fishing and touring. The tourism plant consisted of small hotels, campgrounds, auto courts, and some very original roadside attractions.

Today, tourism is splintered into numerous specialty niche markets based on activities such as outdoor sports (summer and winter); arts, theatre and cultural attractions; and wildlife viewing. Tourism facilities now include commercial attractions, themed restaurants, strata-titled hotels, timeshare resorts, and eco-tourism lodges.

4.1.1 Trends Impacting The Future Of Tourism

Age, life stages, and earning power are key determinants for the purchase of travel products. Now, and in the future, the group having the most dramatic impact on the travel industry is the Baby Boomers - those persons born between 1946 and 1964. This nearly two decade long period of population growth produced nearly 10 million Canadians and 75 million Americans. In fact, approximately 30% of all Canadians and about 28% of Americans are Baby Boomers.

This group has been very dominant throughout their life stages and has transformed the market based on their numbers. They created a boom in school construction, in housing starts, in clothing sales, in automobile sales, and in tourism. Their impact on the travel industry will likely become even more dramatic over the next decade. This is because Boomers - more than any other group in the recent past - have the financial means and the interest in travelling. Boomers typically travelled when they were younger, both on family holidays and as young adults, and are expected to remain avid travelers as they grow older. As of the mid 1990s, about 40% of all domestic travel in Canada was by Baby Boomers, and they spent about 50% of all the domestic travel money.

The first Baby Boomers to enter the peak income earning years (typically 45 to 54) did so in 1991 and the last will come through this period in 2018. Persons in this age group typically have increased incomes, and with children leaving home, the Boomer parents will have the ability and the financial means to travel.

The older Boomers are saving more money now that their families are growing up - and a portion of this money will be used to travel. Additional future family wealth will be driven by the trend towards two income families through the 1980s and 1990s - that should become two pension families in the current millennium.

An additional financial windfall is anticipated due to the inheritance likely to be passed on by the parents of today's Boomers. This group survived two world wars, and the last century's major economic depression. These events caused Boomer parents to be very financially cautious through the post war boom of the 1950s and 1960s. Much of this wealth (estimated to exceed \$10 trillion throughout North America) will be passed on to today's Boomers in the form of inheritance. Boomers will spend a portion of this money on travel.

Future travel by Boomers is likely to be different than travel in the past, and Boomers are likely to exhibit the following trends:

- more individualistic and perhaps not as likely to travel in groups
- more well travelled and travel savvy, and will be more demanding in obtaining service and value
- more knowledgeable, quality conscious and sophisticated consumers
- interested in a sense of achievement rather than rest and relaxation
- used to being fun seekers and thinking and acting young - this will continue as they age
- more environmentally aware and may shun mass travel destinations
- more likely to be interested in cultural or educational themes to their travels
- well educated and inclined to expand their education through learning oriented travel

4.1.2 Trends in Outdoor Recreation

The focus of this study is on adventure tourism, particularly the "soft" or less arduous variety. Guiding the future of adventure tourism is societal trends as discussed above, and more specific trends in outdoor activity participation.

Trends in participation in nature related activities have been documented in a study entitled *The Importance of Nature to Canadians*. This national report involved participation by numerous provincial and federal agencies, and was coordinated by Statistics Canada. It involved a sample of 61,000 Canadians, including 5,500 BC residents.

The study indicated that about 20 million Canadian over 15 years of age (about 85%) of the population took part in one or more nature related activities in 1996. They spent a total of 1.5 billion days participating in these activities and took 191 million trips to partake in these activities. About 44% of Canadians over 15 years of age participated in one or more specific outdoor activities (from photography to rock climbing). In doing so, they spent an average of 16 days per participant per year and took an average of 13 trips per participant.

Nature based outdoor recreation is also important to Americans, and the proportion of persons participating in many activities is growing steadily. Information on US trends has been gleaned from *Americans at Play - Demographics of Outdoor Recreation and Travel*. Their research indicates that over 75% of Americans participate in some form of human powered outdoor recreation.

Some of the fast growth activities of relevance to this study are birdwatching, hiking, backpacking, and sightseeing. Contributing to this growth are increasing numbers of women and more persons in the older age groups. Growth is expected to continue for outdoor activities due to overall population growth, changing demographics, better equipment, improving transportation, and the role of the "enthusiast" as the trend setter or person to emulate.

4.1.3 Impacts Of Societal Changes And Travel Trends On The Cassiar Region

British Columbia in general, but specifically the northern interior, has the opportunity to capitalize on the dramatic shifts that are occurring in the travel industry. The area has the natural resources and the potential to develop a range of marketable travel products. A difficulty will remain the relative isolation and distance from markets, a problem shared by all northern destinations.

The following are some observations of travel trends and their likely implications on the Cassiar Region.

Table 4-1 Tourism Implications of Trends

Trend	Tourism Implications	Implications for the Cassiar Region
Societal		
Market dominance of Baby Boomers	Represents nearly one-third of the North American population, and a large proportion have the means and interest in travel.	Cassiar Region has resources and tourism products of interest to this group.
General aging of the population	Greater proportion of people with the means and time for travel. These people will be older but act younger than a generation ago.	Cultural attractions and soft adventure are major areas of interest.
Economic		
Strong growth in North American and European economies	Continued disposable income to be devoted to travel.	Participation in the continued growth of Canadian, US, and European tourism.
Continued turn-around in Asia	Increases in outbound travel from Asia to the levels of the mid 1990s.	Increased potential to tap Asian markets.
Improved growth in the BC economy after the year 2000	More BC residents with the means to travel.	Expanded opportunities to cater to the domestic market.
Technology		
The Internet	The Internet will continue to increase its importance as a travel booking tool.	Potential visitors will be able to deal directly with tourism operators.
	The Internet will become a major marketing tool for operators.	A very economical and direct way for operators - particularly small operators - to make their product available to a wide audience.
Access		
Highway 37	Continued improvements are anticipated in Highway 37.	Increases in through traffic and in destination business.
Vancouver as the gateway	Vancouver's share of international air traffic is expected to increase.	Vancouver is the gateway airport to long haul traffic to BC.
Markets		
Highway 37 Through Traffic	Growth expected in this Alaska bound traffic	Opportunity to tap this market for day and overnight stops.

Growing interest in history and culture	Continued interest in cultural tourism.	Opportunities to build on diverse First Nations culture and history.
Desire to see and do new things	Continued growth in demand for soft adventure products.	Opportunities to capitalize in this trend.

4.2 Tour Operator Perspectives

As part of the market analysis process, interviews were held with a sample of tour operators who are active along the Highway 37 corridor. A list of operators was obtained from one of the accommodation operators along on Highway 37. A sample of eight of these operators was interviewed by telephone. Operators were queried on the number of years they have been operating in the area, number of trips they make annually, the number of clients, months of operation, time spent in the area, client profile, customer origin, activities pursued, and activities they would pursue if available.

All the bus tour operators contacted were passing through, not destined to, the area. Most were taking Highway 37 because it was a shorter route between central BC and the Yukon and Alaska. Other operators were using the route as part of their Alaska circle tour. Most operators mentioned that the area was very scenic, but it was generally viewed as a pass-through area. This is partly the case because of their pre-scheduled itineraries, and partly because there is very little in the way of facilities or structured activities for them to take advantage of.

Years visiting the area	Operators had been active in the region for from one to 30 years. Most had been visiting the area for only a few years.
Number of Trips	Most operated from one to four trips, but one operator did 50
Number of Clients	Most tours operate with an average of 30 persons
Months of Operation	June to September is the operating season with July and August being the most popular.
Number of Nights	All operators interviewed spent one night in Dease Lake, mainly because of its convenient location for a stop-over.
Money Spent	The average amount of money spent per person was estimated to be \$65. This was for accommodation, food and gifts/souvenirs.
Client Profile	There tended to be an equal number of males and females. Nearly all clients were retired and in the 65 to 85 age group. Most were travelling as couples although a number of singles were reported.
Origin	Guest origin depended on the origin of the tour company. Of this sample, most were Canadians and Americans, although a number of Europeans and Australians were also reported.
Activities	None of the operators contacted pursued any activities while in the region. The corridor was used because it was scenic and the shortest route to/from the Yukon and Alaska.

Desired Activities The most frequently suggested activity was native culture interpretation. Other suggestions included interpreted walks, evening activities, and wildlife viewing.

4.3 Other Market Information

The small population base - and the small number of tourist facilities and low tourist volumes - has resulted in few measures of tourism performance being available. Some of the traditional sources of information, and their relevance to the Cassiar region, are outlined below.

BC Visitors Study

This exhaustive survey of resident and non-resident travellers was conducted in the province in 1995 and 1996. It involved interviews with thousands of travellers to and within the province. However, no specific analysis was done on the Highway 37 corridor. The best that can be done with the information is to look at some activity preferences in the north.

Highway 37 is located in the Northern BC Tourism Region (in what was then known as the North by Northwest or just Northwest region). This area includes nearly all of the Highway 16 corridor from Alberta to Prince Rupert, and the communities along this route dominate the region. The following selected statistics are from the *BC Visitor Study - Northern British Columbia Tourism Region: Northwest*, and they apply to the entire Northwest region. These statistics are cited to indicate the kinds of activities that travellers to northern BC pursue.

<i>Activities in the Region</i>	Non-Resident	BC Resident	
		Total	North
Sightseeing in the country	9%	NA	NA
Freshwater fishing	15%	NA	NA
Hiking/Backpacking	7%	NA	NA
<i>Outdoor Activities in BC</i>			
Visiting Parks	43%	19%	17%
Wildlife viewing	50%	33%	30%
Hiking/backpacking	14%	24%	19%
Freshwater fishing	15%	-	-

BC Parks Attendance

There are four provincial parks in the Cassiar region - two frontcountry and two backcountry. Average attendance at Kinsikan Lake over the last five years is 3183 parties. All of this visitation is recorded from May to September with July and August generating over 1000 parties each. There appears to have been a slight decline in park visitation over the last five years.

Average visitation at Boya Lake was almost identical at 3027 parties. Again July and August are responsible for over two-thirds of the total. The similar totals indicate that the same visitors could be using both parks.

Spatsizi Plateau and Mount Edziza Parks have very low recorded visitation numbers. This is partly due to the remoteness of the parks and to the visitor counting techniques which probably underestimate the park visitors. Mount Edziza had a recorded annual average of only 200 visitors, and Spatsizi 270 visitors (at Coldfish Lake).

Room Revenue

The Ministry of Finance records room revenue based on room tax remittances. The information is published by BC Stats on a community basis by type of facility. However, there are too few accommodation establishments in the Cassiar region to maintain operator confidentiality, so the numbers are not available.

Highway 37 Traffic

Regular traffic counts are not recorded on Highway 37. However information from a recent report (Economic Benefits Generated by Improvements of Highway 37) indicate about 500 vehicles a day use the route in the summer. The annual average traffic is about 330 vehicles per day.

Tourist traffic is estimated to represent about 60% of summer use, but only about 25% of year round use. Truck traffic and personal use make up the other 75%. The report indicates that there has been no apparent growth in summer traffic volume over the ten-year period from 1985 to 1995.

4.4 Market Categories

The existing markets, to and within the Cassiar, fall into two categories. One is the highway oriented pass-through market and the other is the destination market.

Pass-through Market

The pass-through market has been relatively stable over the last decade and appears to use the highway as an alternate route to get to and from the Yukon and Alaska. This through traffic category has traditionally been difficult to tap, as Highway 37 appears to act as the arterial for traffic destined elsewhere. This market stops to purchase basic travel needs of food, fuel and enroute accommodation, but does not stay.

Typically, both independent travellers and group tours are operating to schedules – either self imposed or pre-arranged. Consequently, it is difficult to motivate them to stop, and/or stay longer once stopped. However, given appealing attractions, or interesting things-to-do, this market category could be motivated to stop and stay longer in the region. Sufficient information about the area, received in advance of the trip, would also help.

Destination Market

The other market category is those persons destined to the Cassiar region. This includes people who are travelling to the area to hunt, fish, canoe, kayak, ski tour, hike, view wildlife, or participate in some other adventure tourism activity. However, in spite of the variety of high quality outdoor recreation resources, the area does not have a destination image.

The area is well known among the relatively small groups of outdoor sport participants. These people come to the area for the quality of the resource, and for the lack of crowds caused by the area's remoteness.

4.5 Product Specific Market Information

This section provides market information, by product or activity. Each product has been described in terms of market size, overall demographics, and a series of other topics relevant to the topic.

4.5.1 Fishing

Description and Market Size

Fishing has traditionally been a popular outdoor recreation pastime in BC. As many as 25% of Americans report they have fished in the last year while the proportion of Canadians is about 18%. Fishing is popular among a broad range of age groups and is particularly appealing to middle aged and older persons. Fishing tends to be much more popular with men, by a ratio of two to one, although given the general popularity of the activity, a large number of women do fish. Participation in fishing does not vary much by education or income. However, this broad appeal of fishing means that there are significant numbers of fishermen in the higher education and upper income categories.

In Canada, about 70 million days are spent fishing, and the average number of days of participation per person is about 17. Anglers took about 50 million fishing trips, with the average number of trips per participant being about 12. Interest in fishing, as measured by the survey results, was nearly 40% indicating considerable growth potential. In BC, there are over 500,000 anglers who spend over 10 million days each and average 19 days per person. They took 7.7 million fishing trips for an average of 14 per person.

Freshwater fish commonly found in BC include trout, char, salmon, steelhead and bass. Freshwater fishing is regulated by the provincial government, except for salmon, which is under the jurisdiction of the federal Department of Fisheries and Oceans.

Overall Demographics

According to a 1988 study in Canada¹, the customers of freshwater fishing lodges were:

- More likely male (64%).
- Generally older, mainly between the ages of 35 and 54 (42%).
- Travelled with family (38%) and in couples (30%).

According to a 1995 US study², freshwater fishing participants were:

- Mostly below the age of 50 (78%) with the largest age segment being between 30 and 39 (26%).
- More likely male (63.5%).

¹ Fishing Lodges and Resorts in British Columbia: Marketing and Development Initiatives, DPA Group Inc., March 1988.

² National Survey on Recreation and the Environment, Outdoor Recreation Resources Review Commission, 1994-95.

In the US, sport fishing participation saw relatively stable participation numbers from 1991 to 1996, declining from 35.6 million to 35.2 million participants, while spending in the sport increased by 36 percent.³ This is an indication of the increasing affluence of fishing participants.

Casual Angler versus Sport Fisherman

The casual angler values easy access to the fishing venue, the lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of family and couple vacationers. The casual angler will more likely require basic instruction beforehand.

The sport fisherman values the opportunity for excellent fishing and guiding services. This market segment looks for remote, wilderness fly-in fishing areas with few other people around. The sport fisherman is willing to pay more for the fishing experience than the casual angler and will base the decision firstly on the quality of fishing. The sport fisherman will also likely bring his (or her) own fishing gear and tackle.

Local versus Overseas Visitors

In general, overseas visitors will be serious sportsmen looking for fishing in a remote wilderness area with restricted access. Given the longer distance travelled, the overseas visitor will take longer trips and be willing to pay more for an exclusive, once-in-a-lifetime experience. Local visitors will take more trips throughout the year, and may engage in more unguided fishing trips once becoming familiar with an area.

4.5.2 Hiking

Description and Market Size

Hiking and backpacking are relatively popular activities in North America. In the United States nearly 25% of people go hiking and 8% go backpacking. In Canada, about 18% of Canadians have gone hiking or backpacking in the last year. In BC the participation rate is nearly 24%.

The incidence of hiking tends to decrease with age although the drop is gradual. Hiking is popular among all income levels, tends to be more common in the larger households, and is nearly as popular with women as with men. Hiking is an easy way to get into the outdoors, and the improvement in equipment and clothing will probably add to its continued appeal. Hikers (and backpackers) participate in other activities while they are hiking such as fishing, wildlife viewing and photography.

Backpacking is a more adventurous and demanding form of hiking and tends to be most popular with persons under 30. Although participation tends to drop off with age, participation increases with income and with education. Men are twice as likely to backpack as women. Even more so than with hiking, better and more lightweight gear, and improved water proof clothing will likely contribute to growth in the activity.

There does not appear to be much in the way of organized hiking occurring in the Cassiar region. However, there is interest and increasing activity by Guide Outfitters in catering to this backcountry market. There is also evidence of specialty tour companies utilizing the heritage trails (specifically the Telegraph Trail) for one-time trips.

³ The Province, January 5, 1998.

Overall Demographics

Hikers in Canada have the following characteristics:⁴

- Even distribution across age groups.
- Evenly split between males and females, although backpackers and avid hikers are more likely to be male.
- Travel with friends or in couples.
- Almost all from Canada or US (83.8%).

Geographic Region	Percent of total participants (1993)
BC	39.3
Ontario	9.4
Rest of Canada	23.2
Canada (total)	71.9
US	11.9
UK	2.2
France	2.4
Germany	6.7
Japan	1.0

For BC residents, there is a participation rate of 43 percent in day hiking.⁵ From other countries, Germany is the largest group.⁶

Soft Adventure Traveller versus Hiking Enthusiast

Hiking enthusiasts hike frequently and are more likely to take hiking trips on their own. Since many hiking trails are well-marked and documented through guidebooks, hiking trip operators must provide value to these type of customers either through a high-end experience (not only the hike but interpretation, meals and lodging) and/or adding in other desired activities which they cannot do on their own.

Most participants in hiking tours tend to be well-travelled, educated and single, although the family and friend market is growing.⁷ Many of them become repeat clients – an important point for tour operators as it implies the need to provide a variety of trips including custom trips for repeat customers. These hikers look for a trip combined with cultural, heritage and other nature-oriented activities such as wildlife viewing.

⁴ Adventure Travel in Canada: An Overview of Market, Product and Business Potential, 1995.

⁵ Major Parks Plan Study – Final Report and Conclusions, p 28, Greater Vancouver Regional District, November 1995.

⁶ Nova Scotia Marine Tourism Study Final Report, p 64, The Economic Planning Group of Canada, December 1997

⁷ Nova Scotia Marine Tourism Study Final Report, p 64, The Economic Planning Group of Canada, December 1997

Based on this view of the hiking market, operators can either target the soft adventure traveller who seeks a high-end, fully-catered product delivered in a safe, comfortable environment that includes comfortable lodging, or the hiking enthusiast that prefers a more participative, physically demanding experience. Hiking enthusiasts will prefer to hike on their own group and only participate in a tour if it involves a significant interpretive component or hiking across unknown/unmarked terrain.

Destination versus Activity

Destination-based decision-makers are those who seek a variety of activities in a given area, which may include day hikes or shorter overnight trips. The decision of when and where to hike specifically is made after arriving at the destination. They are also very interested in the lodging/accommodation at the destination, which may serve as their "home base" for the duration of their stay.

Travellers who have based their trip on a participating on a particular hiking tour will generally go on longer and more intense hikes, such as the West Coast Trail, with a well-planned itinerary.

Fitness versus Nature Enthusiast

Hiking has become a popular way of improving one's fitness while enjoying the outdoors. Hikers who value the fitness benefit will seek more difficult hikes. The nature enthusiast values the enjoyment of the surrounding environment and will prefer soft adventure tours that include interpretation and education.

4.5.3 Lodges

Description

Lodges are not an activity but are included in our analysis because they provide the location or base from which outdoor/adventure activities can occur. Lodges require road access (with the exception of fly-in operations), and utilities of power, water and some form of sewage treatment. It is also important to note that the size of lodge being considered here is relatively small, in keeping with the relatively small markets. These might range from a few rooms to maybe two-dozen rooms.

Specialty lodges have been developed over the last decade catering to the emerging adventure tourism market. Older "resort" type facilities have also been renovated and retrofitted to cater to markets of the 1990s and the new millennium. Examples are fishing camps catering to kayakers and Guide Outfitter camps to cater to wildlife viewers.

Overall Demographics

Demographic change of key markets indicate a growing demand for this product, in North America and internationally, especially among baby boomers. However, because a resort holiday usually implies higher levels of spending, the product appeal is relatively narrow for the overall outdoor adventure market. The demographics for a particular lodge will depend on the type of activities it offers and the experience level required to participate in the activity in the area supported by the lodge.

Soft Adventure Traveller versus Activity Enthusiast

The soft adventure traveller looks for a lodge that will provide the best overall "experience". This includes a combination of the accommodation, food and activities offered that are high-end and/or

unique. The activity enthusiast will select a lodge based on its location and support for a particular activity. This is particularly relevant for activities such as fishing or backcountry skiing, that are highly dependent on having particular resources, features and conditions.

General Consumer versus Experienced Ecotourist⁸

Lodges are generally preferred by the experienced ecotourist, with 66 percent stating cabins as their preferred choice of accommodation, followed by lodges/inns at 60 percent and tent/camping at 58 percent. In contrast, the general consumer prefers to stay in hotels/motels (56 percent), although as lodges become more upscale and comfortable, they will gain increasing popularity with the general consumer as well.

Corporate versus Personal Traveller

Corporate travellers use lodges either for meetings with their own management teams and with clients, and for incentive travel, which is used as a means to reward/motivate employees. This segment looks for amenities such as meeting and conference rooms, fully equipped with telephones and Internet access. Individual rooms may also be required to have data access. As well, they will look for activities that promote interaction between people, particularly if the purpose of the trip is for team-building for managers or with clients.

The personal traveller is looking for a unique location and activities to do with friends and/or family. This segment values the overall ambiance of the location as well as opportunity to have both privacy as desired and opportunity to meet and share experiences with other guests in common areas.

These market segments are not necessarily mutually exclusive. Often, a corporate traveller will choose to bring their families on a subsequent vacation if they enjoyed the experience and if the lodge caters to both segments.

4.5.4 Ski Touring

Description and Market Size

Ski touring is a specialized activity that does not enjoy widespread popularity, mainly because of the skill involved, and the lack of proximity to ski touring areas. By comparison to other types of skiing, about 30% of North Americans cross-country ski – about half the number who downhill ski. Backcountry skiing participation represents an even smaller segment of Nordic or ski-touring market. A small amount of ski touring currently occurs in the Cassiar region by patrons of existing lodges and from inbound tours.

Nordic skiing includes any skiing activity which is “free-heeled” – where the ski bindings are not attached at the heel as opposed to alpine ski bindings. In the US, participation has increased by nearly 25 percent from 1982 to 1994.⁹ Nordic skiing has been broken down into the following categories:¹⁰

⁸ Greening of Remote Tourism Lodges, Pam Wight & Associates, 1994.

⁹ Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-21, The Randolph Group, January 1997.

¹⁰ “Nordic Skiing: Kick Up Your Heels”, www.rei.com.

Surface	Classic	Skating	Telemark	Ski Touring
Tracks				
Groomed				
Backcountry				

Other activities are often combined with this activity such as snowmobiling, winter camping and orienteering.

Overall Demographics

Cross-country skiing adventure travellers in Canada have the following characteristics:¹¹

- Younger, with 52.9% under 34.
- More likely female (54.2%).
- Travel in families (38.2%) or with friends (27.0%).
- Almost all from Canada or US (91.5%).¹²

Geographic Region	Percent of Total Participants (1993)
BC	7.9
Ontario	49.1
Rest of Canada	18.8
Canada (total)	75.8
US	15.7
UK	0.7
France	2.8
Germany	1.1
Japan	0.5

More recent statistics for the US show that nordic skiers are evenly split between male and female. The majority of these skiers also participate in other outdoor sports such as hiking, camping and fishing and 25 percent are also alpine skiers.¹³ Although cross-country skiing has seen the number of

¹¹ Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

¹² Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

¹³ SnowSports Industries America, 1999.

participants decrease over the last decade, the number of women learning to cross-country ski has been on the rise.¹⁴

As well, participation has been increasing amongst senior citizens as the activity has been promoted as an excellent way to enjoy the outdoors and maintain a good level of fitness.

Families with Children versus Couples

While this approach to segmenting the market is far from complete, it focuses on two key customer types within the market that are significant and have distinct needs. Families with children value good instruction, for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection, and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but an overall ambience. Key elements to creating the appropriate ambience include dining and accommodation, which can be designed to cater specifically to the couples market.

Destination versus Activity

Destination-based decision makers will choose a destination that offers several activities, with nordic skiing being one possibility. They are more likely to participate in day tours on groomed trails in a multi-activity resort area and will try two or more different activities during their visit. Many participants within this category are alpine skiers who may want to try something different for a day.

Activity-based decision makers are avid nordic skiers who select the destination based on the best location for them to cross-country ski. They are more likely to participate in backcountry touring over several days.

Fitness Buff versus Recreationalist

The fitness buff has undertaken cross-country skiing primarily as a means to stay in shape during the winter and enjoys the physical exertion from the activity. Nordic skiing is an excellent aerobic workout that uses the entire body. This market segment is more likely to participate in classic and skate skiing on groomed runs where trails and distances are well-marked. As well, fitness buffs are generally younger and participate in the activity alone or with friends.

The recreationalist enjoys the social aspect of the sport and tends to participate with family and friends. The main purpose of the activity is to enjoy the outdoors during the winter. Fitness, however, may be a secondary reason for participating in cross-country skiing. The recreationalist is more likely to ski in the backcountry.

Participant versus Enthusiast

Enthusiasts are those people who participate in the activity several times a year. They will invest in their own equipment and look for performance skis. In most cases, they will rely on their network of friends and guidebooks to go on self-guided trips. They also seek a high level of instruction, to improve their technique and in understanding the environment, such as avalanche safety.

Participants will often require basic instruction and equipment rentals. They are more likely to go on a guided tour, particularly if going into the backcountry.

¹⁴ SkiTrax, December/Holiday 1999, p.33, "Clear the Trails, Here Come the Grrrls", Kate Carter.

4.5.5 River Recreation

Description and Market Size

River recreation encompasses all forms of activity including kayaking, canoeing and rafting. For our purposes, it also includes both flat water and white water versions.

About 7% of Americans have recently canoed and the activity tends to cater to men under 50, and those with high household incomes. Floating and rafting have been pursued by about 8% of Americans in the last year. Participants tend to be young adults and they generally participate in the activity in groups. Rafting is dominated by commercial operators, as opposed to independent users.

Kayaking is pursued by only 1% of Americans, and they tend to be young to middle aged adults with high household incomes. In Canada, canoeing and kayaking combined are pursued by 10% of the population, and about 9% of BC residents.

The future of canoeing is expected to be reasonably bright. Canoeing is part of the North American heritage and is relatively easy to learn. It is also a portable activity as participants can easily take their boats to any river that is accessible by vehicle. Rafting requires little skill on the part of the customers (on a commercial trip) but provides access to unique and remote river environments. Demand is expected to continue for a variety of river experiences. River kayaking is a particularly demanding sport requiring considerable skill. Consequently it will probably grow more slowly than the other river recreation sports.

River kayaking is a much more specialised, niche activity compared to sea kayaking. It is not targeted to the larger soft adventure market. Therefore, most operators also run whitewater rafting tours as well to ensure adequate volumes of business.

Overall Demographics

River kayaking adventure travellers in Canada have the following characteristics:¹⁵

- Younger (between 20 and 44 years old)
- Male (59.9%)
- Travel with friends (29.4%) or in couples (28.0%)
- Almost all from Canada or US (93.5%) with over 80% from within Canada.

Geographic Region	Percent of Total Participants (1993)
BC	10.7
Ontario	45.1
Rest of Canada	25.7
Canada (total)	81.5
US	12.0

¹⁵ Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p 3-31, The Randolph Group, January 1997.

UK	1.2
France	0.8
Germany	0.1
Japan	0.8

This demographic profile of the North American (Canada/US) younger adult is more consistent with the enthusiast profile below.

Participant versus Enthusiast

An enthusiast has been defined as a person who kayaks 9 times or more in a year, whereas a participant is anyone else who kayaks at least once a year.¹⁶ Whitewater kayakers are generally enthusiasts dedicated to the sport that use their own kayaks. The key criteria used by enthusiasts are the same as those described for activity-based decision-makers.

A "participant" is more likely to value other activities such as culture and scenery, similar to the destination-based decision-maker. This category also includes special groups such as schools and women's groups, who are looking for a "once-in-a-lifetime" experience. The participant segment is looking for a trip that includes river kayaking as only a part of a larger overall experience.

River Running versus Whitewater Rodeo

River running, or kayaking downstream with the river's current, includes both shorter and longer trips that include overnight camping. The number of people in this segment appears to have stayed relatively flat over the last few years.

Growing in popularity is the sport of whitewater rodeo or playboating, which involves staying in one area of the river and performing a series of technical manoeuvres. The participants in this segment tend to take much shorter trips, usually 1 or 2 days.

Destination versus Activity

Since river kayaking is a riskier, hard adventure activity than most other outdoor activities that requires reasonable skills, most river kayakers will have selected their travel destination based on their decision to participate in the activity. In other words, the *activity-based decision-maker* segment is more significant. It is unlikely that travellers will make a spontaneous decision to participate in whitewater kayaking after arriving at a destination.

The key criteria used by the activity-based decision-maker include the level of whitewater vis-à-vis the kayaker's skill level (Class IV and V for experts), and access to the river for put-ins and take-outs. The better-developed river destinations allow users to drive near the rivers and launch points. Finally, emergency provisions and promotion of safety also play a factor in the decision of where to kayak. Additional criteria used by destination-based decision-makers who engage in river kayaking include the scenic beauty and unique cultural aspects of the destination area.

¹⁶ "Outdoor Recreation Participation Study for the United States", Outdoor Recreation Coalition of America, December 1997.

4.5.6 Road Touring

Description and Market Size

This activity focuses on driving and sightseeing, both on highway and in cities/towns. While this type of touring is primarily self-guided, guided bus and motorcoach tours are also included. In the US, 57 percent of the population reported to participate in sightseeing, and participation increased by 40 percent from 81.3 million participants in 1982-1983 to 113.4 million participants in 1994-1995.¹⁷

Road touring in the Cassiar is a very limited activity in terms of options (Highway 37 and the road to Telegraph Creek), but very significant in terms of existing markets. Currently about 500 vehicles a day use Highway 37 in the summer (and considerably fewer in the winter). Many of these vehicles are tourists either visiting, or more likely, passing through the area.

Sightseeing is a very popular tourist activity and is often the main purpose of a touring trip. According to the most recent Visitors Study for Northwestern BC, sightseeing was the primary trip purpose for 29% of non-residents and 39% of the more distant visitors. Sightseeing is expected to grow based on the interests of an ageing population and on the expected improvements in Highway 37, which should bring more vehicles to the region.

The scenery available in the Cassiar region is spectacular. Vistas from the road offer views of wide valleys and a variety of mountains, plus numerous rivers and lakes. This variety of high quality, largely unaltered landscapes, provides very attractive sightseeing opportunities. The opportunity to see wildlife is also relatively good and is a particularly appealing component of road touring.

Overall Demographics

The following data was compiled from 1998 BC visitor studies¹⁸:

Market Origin	Sightseeing as primary purpose	Participate in Events	Visit Attractions	City Sightseeing	% Expenditure on Packaged Tours	Mode of Transport while in BC		
						Car/Motorcycle	Bus/Motorcoach	RV
BC Residents	5%	11%	33%	-	-	86%	5%	4%
Western Canada	14%	33%	58%	67%	6%	85%	9%	9%
Eastern Canada	20%	32%	73%	83%	11%	86%	21%	4%
Regional US	18%	28%	67%	77%	10%	82%	8%	7%
Long Haul US	39%	24%	81%	83%	19%	69%	20%	9%

¹⁷ National Survey on Recreation and the Environment, 1994-1995.

¹⁸ British Columbia Visitor Studies, BC Tourism, 1998

Europe	29%	37%	72%	71%	23%	65%	38%	12%
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In general, the further a tourist came from, the more likely sightseeing was the primary purpose of the trip. Visitors from Europe, long-haul US and Eastern Canada are also more likely to visit sightseeing attractions and to spend a greater proportion of their money on packaged tours. Since many of these tours are offered with bus or motorcoach as transportation, it stands to reason that the long-haul US and European visitors are also more likely to use buses for transportation. By far the majority of visitors use cars for transportation while in BC, suggesting that most visitors take self-guided sightseeing trips.

In the US, sightseeing participants took an average of 9.1 trips per year, with each trip begin just under 2 days.¹⁹

Independent versus packaged tour travellers

As mentioned above, the further travellers have come from, the more likely they are to participate in a guided, packaged tour. These travellers value the knowledge of the area by the tour company and the convenience of being able to see all of the major sights without significant planning. Packaged tour travellers are willing to pay for the convenience of having most of their sightseeing, transportation, accommodation and food arranged for them. Independent travellers value the flexibility and privacy of travelling on their own according to their own schedule. They may have planned a detailed itinerary before arrival, or plan their trip along the way, enabling them to experience certain venues for longer periods of time (perhaps with unplanned overnight stays).

4.5.7 Wildlife Viewing

Description and Market Size

Wildlife viewing is an activity that involves observing and learning about animals in their natural habitat. It includes activities such as, large mammal viewing and birdwatching (although birdwatching is often placed into a separate category for statistical purposes - birdwatching is one of the most popular and fastest growing recreational activities in North America²⁰). Wildlife viewing is often added as a theme to other activities such as hiking or kayaking and trips can range from a half-day to 7 days.

Wildlife viewing has increased dramatically in popularity over the past decade. Over 30% of Americans participate in wildlife viewing annually. The activity encompasses persons in all age groups, but participation tends to peak in middle-age. In Canada, about 19% of persons over 15 participate in the activity. The split between males and females is 50/50 while participation tends to increase with income and education.

BC participants spend a total of 15 million days watching wildlife for an average of 24 days per participant. Wildlife viewers also travel to partake in the activity, taking 11 million trips, and averaging 18 trips per person.

¹⁹ National Survey on Recreation and the Environment, 1994-1995.

²⁰ "Not just for the birds", Dawn Hanna, Vancouver Sun, F7, March 19, 1998.

The future of wildlife viewing appears bright due to the simplicity of the activity, and the broad appeal of seeing animals in their natural environment. Technological advances such as night vision goggles will add another dimension to the activity. Complementing this strong existing and future demand for wildlife viewing is the rich wildlife resources of the Cassiar region.

Overall Demographics

According to a 1995 study in Canada²¹, wildlife viewing (including birdwatching) travellers in Canada have the following characteristics:

- Baby boomers with more than half between 35 and 54
- Even split between male and female
- Mainly travelling in couples or families
- Over three-quarters are from Canada or US.

Birdwatching is fastest growing sub-segment and its participants are generally older, more educated and affluent than those in other wildlife viewing activities.²² BC residents are active participants with 32 percent involved in wildlife viewing and 20 percent in birding.²³ There are opportunities to target both BC residents and out-of-province visitors in this growing market. The participants in this activity also fit the profile generally associated with the soft adventure traveller.

Primary versus Secondary Activity

Wildlife viewing is generally not the prime reason for a tourist to select a travel destination. For one-third of operators offering wildlife viewing tours, wildlife viewing was a secondary product.²⁴ However, there are tourists who choose a destination primarily because of its wildlife viewing. For example, avid nature enthusiasts go to the Johnstone and Queen Charlotte Straits for its prime whale watching (orcas). The casual wildlife viewer is more likely to participate in wildlife viewing as one of several activities offered by a travel destination.

²¹ Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p 3-31, The Randolph Group, January 1997.

²² Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p 3-28, The Randolph Group, January 1997.

²³ Major Parks Plan Study – Final Report and Conclusions, p 28, November 1995.

²⁴ Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p 14, 1995.

5. Product Analysis

The locations suitable for various products have been mapped as part of the computer generated capability analysis. This information has been augmented by local input and the opinions of the analysts. The mapping was done at a scale of 1:250,000 (approximately 4 miles to the inch), and the paper plots were made at 1:675,000 (approximately 10 miles to the inch). For reporting purposes, these plots have been further reduced to 11" by 17". (See Appendix E.)

Due to the size of the study area, and the mapping scales used, many of the following locations are general. However, where the information was available, more specific locations are described.

As a general comment on product location suitability analysis, the Cassiar region is huge. It has vast areas of terrain containing literally hundreds of "sites" that exhibit high suitability for a range of products. The tourism development implementation issue stemming from this array of possibilities is to encourage existing operators or potential developers to short-list candidate sites for possible development. This operator-lead process will allow interested parties to conduct their own selection analysis based on the broadly based capability analysis presented in this report.

Each of the products has been assessed from four separate perspectives. These are:

SWOT

Strengths, Weaknesses, Opportunities and Threats
descriptive of each of the activity products.

**Key Trends and
Development Issues**

Key trends or issues that could affect the future of the
activity.

**Product Components and
Success Factors**

Key factors that could be important in developing the
activity.

Possible Locations

Possible areas that could be suitable for development of
the activity.

5.1 Fishing

SWOT**Strengths**

Access to sites...Variety of sports species...Numerous productive
river systems and lakes.

Weaknesses

Uncertainty of regulations...Limited promotion...Illegal
guiding...Increasing multi-use of rivers...Cost to get to the area.

Opportunities

Nature and wildlife interpretation...Fly-in fishing...Expansion of
existing lodges...Targeting less popular species...Expand acceptance
of catch and release.

Threats

Decline in fish stocks...Late confirmation of regulations...Poorly
timed sport fishing closures.

Key Trends and Development Issues

Issue/Trend	Implications
Ecotourism continues to grow in popularity.	Fishing lodges will need to support activities other than fishing, which are non-consumptive. They will need to be developed and operated in such a way as to minimize the environmental impact. This includes adopting catch-and-release approaches and following a "green" code of conduct.
Increasingly, in order to conserve fishing stocks, catch-and-release rules (using barbless hooks) are being implemented. Canadian resorts generally follow stricter catch-and-release standards than required by law.	Fishing tour operators will need to be aware of the regulations as well as ensure that they are being followed for all their trips. The operators can use photographs to record catches as well as emphasize the overall experience to their customers rather than simply the catch itself.
Fishing is restricted to a set season as per the angling regulations set by the Ministry of Environment, Lands and Parks. As well, the Department of Fisheries and Oceans has had restrictions on coho and chinook salmon since 1998, which can be found in BC's rivers as well as the ocean.	Fishing lodges may need to look at diversification into other activities to deal with short fishing seasons, which leave the lodges susceptible to cashflow problems.
Other activities competing for many of the same customers as freshwater fishing are becoming increasingly popular, (i.e. golf).	Fishing lodges will need to develop other features to compete effectively against other recreational activities. This includes additions such as conference/meeting facilities to cater to the business segment, and including other recreational activities.
Freshwater fishing is becoming more of a family activity. ²⁵	Fishing tour operators will need to cater to this segment, particularly in offering instruction and guiding for children as well as adults. Other activities that can be enjoyed by families should be offered as well to attract this market to a lodge facility.
Land use permits around lakes are difficult to obtain and there is increasing potential for conflict with logging and mining companies, as well as First Nations people.	Without tenure for a lodge and fishing area and cooperation from key groups such as resource companies and aboriginal groups, development of such facilities/areas will be limited.

²⁵ Trends in American Fishing. Bass Anglers Sportsman Society. 1994.

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Fishing	▪ Pristine yet accessible area. ▪ Scenery. ▪ Weather. ▪ Quantity and size of fish. ▪ Ease of catching fish.	▪ Selecting an area that, aside from the lodge and facilities, is undeveloped. ▪ Gaining restricted access to fishing area through tenure. ▪ Developing and following guidelines for conserving and/or increasing the fish stock.
Fishing Equipment	▪ High-quality equipment and boats. ▪ Appropriate bait for the species of fish and area.	▪ Purchasing and maintaining high-quality gear, tackle and boats. ▪ Hiring knowledgeable guides who are familiar with the fish in the area.
Instruction	▪ Lessons from beginner to advanced, if targeting families and couples, instruction for children and women.	▪ Hiring knowledgeable, personable guides/instructors.
Guiding	▪ Knowledge of fish and peak fishing times. ▪ Knowledge and interpretation of natural and cultural features in the area. ▪ Knowledge of fishing regulations.	▪ Hiring and retaining knowledgeable, experienced and personable guides. ▪ Following fishing regulations and responsible use of the area. ▪ Emphasizing the overall experience, not just catching fish. ▪ Using experience and technology to track best fishing locations/times.
Packing And Freezing	▪ Service for out-of-town and overseas customers. ▪ Adequate freezer space.	▪ Providing quality service on the premises and full shipping information and services for overseas guests.
Other Activities	▪ Wide variety, if targeting families and couples including activities such as wildlife	▪ Identifying a target market and then developing an appropriate program of activities suited to

Product Component	Key Success Factors	Lever For Success
	watching, hiking, trail riding, canoeing, kayaking.	that market.
Food And Accommodation	▪ Privacy ▪ Ambiance. ▪ Minimal impact on environment.	▪ Selecting a remote, scenic location with controlled access. ▪ Following strict environmental principles in building and operating the lodge and developing a code of conduct to be followed by both staff and guests. ▪ Designing the building so that guests are allowed privacy and also common areas that encourage interaction amongst guests. ▪ Adding amenities (such as a sauna) that add to the enjoyment of the overall experience.
Transportation	▪ Ease of access to and from major centres.	▪ Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.

Possible Locations

Fishing opportunities are very widely dispersed throughout the Cassiar region. Licensed fishing guides are active in dozens of rivers and lakes, and recreational fishing takes place in many more. Fish inventory information indicates the presence of salmon in all the major drainages including the Stikine, Iskut, Tahltan, Nakina, and Taku Rivers. Various species of trout are also located in these drainages, plus in Kiniskan Lake, Dease Lake, Cry Lake and the Iskut Lakes.

This wide distribution of fish creates a focus for many angling opportunities. The key frontcountry opportunities are the Iskut Lakes, Kinsikan Lake, Dease Lake and Dease River. Backcountry opportunities are located in literally hundreds of water bodies throughout the region. Air access is permitted in all lakes although permits may be required.

5.2 Hiking

SWOT

Strengths	Nationally significant scenic features...Literally hundreds of trails including First Nations trails, guide outfitter trails, and heritage trails...Access to a wide variety of terrain types.
Weaknesses	Short season...Limited information on location of trails...Access concerns...Lack of facilities...Lack of maintenance.
Opportunities	Development of a hiking reputation...Short frontcountry walks and longer backcountry hikes... Telegraph Trail between Iskut and Telegraph Creek...Link with other products. Hut to hut hiking.
Threats	Jurisdiction concerns for development and maintenance.

Key Trends and Issues

Issue/Trend	Implications
The growing popularity of camping, especially tent camping, by 17 percent from 1987 to 1997 in the U.S. ²⁶ Campers tend to be hikers.	This suggests that overnight trips will be increasingly popular, particularly for the hiking enthusiast market segment. The increase in demand for overnight itineraries will create advantages for those areas with high scenic, natural and recreational resources. It will also create opportunities for hut product.
Increasingly, operators are offering specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Spa resorts target the fitness enthusiast with rigorous hiking followed by relaxing massages.	Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs. A tour operator can differentiate itself by catering to a specific target market, rather than attempting to provide trips with broad appeal. This will require more sophisticated and well-planned market programs.
Parks are a main attraction for hikers, especially Europeans. But development in park areas in North America is being subjected to more scrutiny by government, environmentalists and recreational user groups. The key issue is balancing accessibility with preservation of the environment.	Tour operators must demonstrate the minimization of impact on the environment and other users as well. They will need to be much more actively in the preservation of the local environment in order to gain acceptance. At the same time, public pressure to reduce in-park development will create trail development opportunities on non-designated Crown land.

²⁶ Sports Participation Trends Report 1997, American Sports Data Inc., 1998.

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Trails	▪ Difficulty rating appropriate for the participants. For soft adventure travellers, this means well-developed, relatively easy trails, in an uncrowded and pristine environment.	▪ Communities can develop trail systems which have various levels of difficulty. More difficult trails can be developed in consultation with tour operators. ▪ Operators who can leverage public trail infrastructure can reduce their operating costs.
Destination	▪ Interesting features for nature and/or culture for day trips. ▪ For overnight trips, good camping or hut location.	▪ Developing trails that take advantage of key features in the area. ▪ Developing camping areas which minimize the impact on the surrounding environment. ▪ Working with local recreation groups on user-group agreements to avoid conflicts.
Guiding And Instruction	▪ Knowledgeable, articulate and interesting guides who know both the routes and natural environment. ▪ Showing concern for the environment. ▪ Instruction relevant to the area such as bear awareness.	▪ Hire guides who are both extremely knowledgeable and personable. ▪ Teaching participants how to minimize impact when hiking and camping in wilderness areas. ▪ Develop good routes for trips including contingency routes in case of poor weather conditions or other parties.
Food	▪ Exceed the expectations of participants – gourmet meals for the affluent soft adventure tourist. ▪ Providing plenty of food given the level of physical activity.	▪ Providing a unique, delicious set of meals that the trips will be remembered for. ▪ Finding out about dietary restrictions and preferences of participants before the trip and developing a meal plan accordingly.

Product Component	Key Success Factors	Levers For Success
Accommodation	- Adequate and comfortable shelter against the elements. - Clean and in good condition. - Catering to the preferences of the participants – soft adventure travellers will prefer lodges while the enthusiast may prefer tents.	- Setting expectations and ensuring participants are prepared for any conditions that can arise. - Ensuring accommodation/campsites are planned and reserved (where possible) ahead of time to ensure availability.
Support	Providing the level of support desired by the participants. For soft adventure, this means vehicles, guides and/or pack animals carrying the majority of the gear. For enthusiasts, minimal support is required.	For soft adventure, this requires detailed planning to ensure that adequate supplies have been packed and that these will be readily available as required (meal times, arrival to campsites).
Transportation	Convenient to and from major centres.	Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.
Interpretation And Other Activities	Activities which add an educational and recreational component such as nature interpretation and wildlife viewing and photography.	- Hiring trained interpreters/guides who are experts in the area and interact well with people. - Using specialists who can provide in-depth knowledge for activities such as wildlife viewing. - Keeping the knowledge of interpreters current. - Being involved in local conservation and research efforts.

Possible Locations

Vast areas of the study area are deemed suitable for hiking based on our computer modelling. Most of these locations follow the main river drainages or are located in the plateau areas. Numerous trails are located throughout the study area. Although not available for mapping for confidentiality reasons, there are estimated to be dozens of trails covering thousands of kilometers. Some are short

connections between key features or connecting river drainages, while others are long trails connecting the interior with the coast. Many of these First Nations trails have been used for centuries for hunting, trapping, gathering and trading.

Another category of trails is the heritage trails developed over the past 150 years during European exploration and settlement of the area. These include gold rush trails and the telegraph trails, of which the Telegraph Trail connecting Iskut, Telegraph Creek and Atlin offers the most interesting possibilities. A third category of trails is those developed by the area's guide outfitters. A further particularly unique hiking feature of the area is the BC Rail grade along the Klappan River west of Spatsizi Park to Dease Lake.

5.3 Lodges

SWOT

Strengths	Nationally significant scenic features...Sports fishing...Wildlife viewing...Trails...River recreation...Proximity to Highway 3.
Weaknesses	Short summer season...Limited sites with road access...Competition from areas closer to markets...Lack of available private land.
Opportunities	Specific activity based lodges (i.e., fishing, ski touring)...General purpose outdoors lodges providing a range of activities.
Threats	Land availability...Forest harvesting...wildlife availability (for viewing)...Trail access.

Key Trends and Issues

Issue/Trend	Implications
Ecotourism continues to grow in popularity.	Lodges will need to support activities, other than fishing and hunting, which are non-consumptive. They will need to be developed and operated so as to minimize the environmental impact. This includes adopting catch-and-release approaches and following a "green" code of conduct.
Lodges are becoming multi-activity and multi-season resort destinations for both guided and self-guided activities.	By being multi-activity and multi-season, lodges are in a better position to manage their cashflow and staff. It will be important to find complementary activities to leverage staff and equipment across seasons.
Some operators that guide tours and own lodges are promoting the lodge as the main attraction as opposed to a particular activity or trip.	While it is still important to have a high quality guiding operation, the lodge can be a differentiating factor, particularly to the soft adventure market. This market looks for a high quality, comfortable experience in the outdoors.

Issue/Trend	Implications
Theming is on the rise. ²⁷ 36 percent of leisure travellers surveyed said they were looking for a resort or hotel with a distinctive theme.	Although outdoor adventure could be considered a theme in and of itself, the increasing number of lodges will dilute this as a differentiating factor. Therefore, specialization will become more important for a lodge to succeed.
Lodges are catering more towards upscale tourism with particular attention to food and wine.	Having gourmet food prepared by a professional chef and a good wine selection (perhaps highlighting local wines) is important for lodges targeting the soft adventure and corporate markets.
Building a lodge is capital-intensive, and has a slow development process with uncertainty of tenure for the building and activity area.	From an existing lodge operator's perspective, this creates a barrier to entry for new competition. From the perspective of a community trying to increase tourism, it will be more difficult to find people to undertake the risk of developing new lodges.
A lodge may not add value to the local economy if it does not employ locals and make use of local suppliers.	Lodges may face resistance from local communities and government organizations in building and operating unless they contribute to the area.

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Building	▪ Remote, uncrowded location. ▪ Ambiance. ▪ Minimal impact on environment. ▪ Other amenities, such as sauna or meeting/conference rooms for business guests.	▪ Selecting a remote, scenic location with controlled access. ▪ Following strict environmental principles in building and operating the lodge and developing a code of conduct to be followed by both staff and guests. ▪ Designing the building so that guests are allowed privacy and also common areas that encourage interaction amongst guests.

²⁷ National Travel Monitor, Yesawich Pepperdine & Brown, 1999.

Product Component	Key Success Factors	Levers For Success
		▪ Adding amenities that add to the enjoyment of the overall experience.
Supported Activities	▪ High-quality equipment for activities. ▪ Information and guides, as required, for route planning and participating in an activity.	▪ Purchasing brand-name equipment that is well-maintained. ▪ Partnering with guiding operations to offer tours where expertise does not exist in-house. ▪ Hiring knowledgeable, personable staff.
Transportation	▪ Ease of access to and from major centres.	▪ Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.

Possible Locations

Potential lodge locations are based on a number of criteria but the most significant is the existence of unique landscape features. Numerous general locations have been identified and mapped. The frontcountry areas of moderate or high capability are located along Highway 37 in the Bob Quinn Lake area, in the Iskut Lakes area, south and north of Dease Lake, and around Cassiar and Good Hope Lake. Backcountry opportunities (non road accessed) exist in literally hundreds of locations. These are typically around lakes (both large and small) with southerly aspect. These sites are widely distributed through the Dease Plateau, the Tanzilla Plateau, and the Taku Plateau.

5.4 Ski Touring

SWOT

Strengths	Nationally significant scenic features...A huge variety of terrain from glaciers to bowls to ridges...Proximity to Highway 37.
Weaknesses	Distance from markets...Intervening opportunities...Access to the high elevation areas...Severe weather.
Opportunities	Backcountry ski touring lodges...Hut to hut tours...Extreme or expert terrain.
Threats	Land availability...Forest harvesting...wildlife availability (for viewing)...Trail access.

Key Trends and Issues

Issue/Trend	Implications
Cross-country ski areas are being transformed into multi-use, winter playgrounds or resort areas. ²⁸ This is to appeal to a broader market.	Operators, particularly those who are lodge-based will need to provide other activities, such as snowshoeing or snowmobiling for their customers. Attention should also be paid to the accommodation and support facilities, all of which are important to the destination-based traveller.
Technology is making nordic skiing more accessible. Touring skis are now more shapely, giving beginners increased performance with less effort for telemarking. As well, lift-serviced telemark skiing is increasing.	Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and overall facilities in attracting the broader market.
Backcountry skiing is becoming more popular.	In order for operators to access backcountry that is more remote, they will depend increasingly on snowmobiles and helicopters to provide access. This may lead to issues in getting permits to access these areas as well as increase potential conflict with snowmobilers.
In the US, user fees are becoming more common for backcountry areas.	Operators should look to incorporate these fees into the cost of their trips. In BC, they should work with recreational skiers to approach the government to ensure that if user fees are introduced, that the fee revenues are used for maintaining and developing the area in which the fees are being assessed.
Ski resorts across Canada and the US are seeing more women taking cross-country ski lessons. At Cypress Mountain, two-thirds of the people taking cross-country lessons are women. ²⁹	Operators should consider offering women-only clinics and tours. As well, the emphasis should be on developing facilities that cater to those new to the activity and recreational participants.

²⁸ SkiTrax, p.29, December/Holiday 1999.

²⁹ Bill Cooper, Cypress Mountain (SkiTrax, December/Holiday 1999).

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Trails Or Ski Area	- Grooming for classic and skate skiing trails. - Well-marked trails. - Uncrowded, scenic area for backcountry touring. - Challenging terrain for advanced skiers. - Excellent snow conditions.	- Grooming on a regular basis (daily) in a cost-effective manner. - Lighting for night skiing can cater to the local and fitness buff markets. - Snowmaking can be used to improve snow conditions. - Developing trails in an area with varied terrain. - Obtaining permits/tenure and planning trip routes in secluded backcountry areas.
Infrastructure	- Transportation to and from base facility and trails. - Adequate parking. - Clear signage within the facilities area.	- Providing bus service to and from. - Providing ample parking space near the facilities area.
Rentals	- High-quality, well-maintained equipment. - Ability to answer questions from beginners to experts on equipment & trails in the area. - For waxed skis, appropriate waxing for given snow conditions. - Availability of appropriate sizes.	- Hiring knowledgeable staff in the rental shop. - Purchasing high-quality equipment and maintaining it regularly. - Keeping track of and meeting the need for various sizes for equipment for the customer segments being targeted.
Instruction	- Patient, knowledgeable and personable instructors. - Well-publicized lessons which are easy to register into. - Beginner trails nearby rental shop and other facilities.	- Hiring certified and friendly people for instructors. - Providing courses packaged with rentals and perhaps guided tours to encourage beginners and casual participants to try a lesson. - Developing trails nearby the facilities where lessons can be conducted.

Product Component	Key Success Factors	Lever For Success
Guiding	- Access to uncrowded areas which are lesser known or unsigned. - Varied and challenging terrain. - For trail systems, ski patrollers or guides who provide directions and advice.	- Hiring certified and friendly people with good knowledge of the local area and safety procedures. - Developing trip routes that have interesting features and will be perceived as challenging by the participants.
Food And Accommodation	Exceeds expectations of customers.	Identifying target markets and developing menu and accommodations that cater to the specific needs of those markets.

Possible Locations

Areas with high capability for ski touring are based on suitable biogeoclimatic zones, high scenery values, backcountry skiing features, slope between 20 to 40 with north aspect. Hundreds and hundreds of sites exist within the region distributed widely throughout the entire area. Virtually all of these areas, by definition, are in the backcountry.

Although not particularly concentrated because the region's mountainous terrain, the key areas include the Cassiar Mountains, the Skeena Mountains, and the Coast Mountains. Input from existing operators indicated current use on the east slope of the Coast Mountains, in Mount Edziza Park, and in the mountains along the lower Stikine River.

5.5 River Recreation

SWOT

Strengths	Nationally significant scenic features...A tremendous variety of rivers offering a variety of conditions & experiences...Close to Highway 37.
Weaknesses	Distance from markets...Intervening opportunities...Access to put in and take out locations.
Opportunities	River rafting tours for groups for short trips...Variety of water from gentle floats to expert caliber rapids.
Threats	Restricted access...Competition from other areas.

Key Trends and Issues

Issue/Trend	Implications
People are generally looking for shorter trips, on average for 7 days when travelling abroad.	Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
Many customers are looking to organize trips for their own groups, rather than signing on as individuals or couples to a larger group.	Tour operators will need to tailor their trips to each of these groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.
There is a trend towards taking trips which combine kayaking with other activities, such as hiking and sightseeing.	Tour operators will need to offer a greater variety of trips that include different destinations and activities.

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Kayak Rentals	Modern, well-maintained equipment.	Consider leasing equipment in order to be able to continually upgrade to newer equipment, more important with river kayaking than with sea kayaking.
Kayak Instruction	- Different levels of instruction depending on ability. - Instructors' ability to clearly explain, demonstrate and provide feedback and coaching.	- Hiring instructors/guides who have proven certification and demonstrate ability to teach. - Ensuring that instructors are kept up-to-date on new teaching and training methods.
River And Its Surroundings	- Good whitewater. - Accessibility to river. - Scenic and unique cultural surroundings.	- If waterflow is controlled by dams, developing coordinated plan to match water conditions with planned usage. - Developing put-in and take-out sites that are easily accessible.
Guiding	- Good knowledge of the river and geography. - Challenging water to navigate for enthusiasts. - First aid and safety	- Investing time and effort in developing the itineraries and routes for trips. - Having pre-prepared options in the event of poor weather.

Product Component	Key Success Factors	Levers For Success
	- knowledge and ability. - This component is a key differentiator since this activity demands more skill and attention.	- Hiring guides who know the area well and are certified. - Ensuring coordinated support is in place for take-outs.
Interpretation	- Attractiveness of scenery - Area with interesting natural and/or cultural environment and history. - Interpreter/guides' knowledge of the area and ability to convey this knowledge in an interesting and informative way. - This component is more important for the destination-based decision-maker.	- Hiring trained interpreters/guides who are local and experts in the area and who interact well with people. - Continually updating the knowledge of interpreters and if appropriate, contributing to local conservation and research efforts.
Food And Accommodation	Be clear on what can be expected for food and accommodation on trips and exceed those expectations.	Carefully planning food and accommodation to be provided and providing this information to customers in advance. This must be consistent with the type of customer being targeted.

Possible Locations

River recreation mapping is based on suitable river conditions, scenery, and rafting features. River recreation opportunities are also widely distributed throughout the region with all the major river systems and tributaries included. The key rivers offering potential based in the capability mapping are the Stikine, Sheslay, Tahltan, Chutine, Iskut, Taku, and Dease Rivers. However, dozens of other rivers, tributaries, and creeks are rated as having high capability.

Some of these opportunities are in the frontcountry such as the Iskut, Tanzilla and Dease Rivers, however the vast majority are backcountry locations. Commercial operators are currently active on the Stikine, Spatsizi, Ross, Turnagain, Major and Dall Rivers.

5.6 Road Touring

SWOT

Strengths	Nationally significant scenic features...First Nations culture ...History...Views from highway... Existence of Highway 37.
Weaknesses	Distance from markets...Intervening opportunities...No road-side attractions or interpretation centers...No circle tours available within the region.
Opportunities	Packaging bus and/or van tours. Interpreted tour to Telegraph Creek. Interpreted walks at rest stops along Highway 37.
Threats	Lack of services...Logging impact to views from highway...Decrease in road maintenance.

Key Trends and Issues

Issue/Trend	Implications
Communities and tour operators along a particular route or in a given area are coordinating their marketing efforts to attract tourists.	In order to compete in the tourist market regionally and worldwide, BC communities will need to find ways to coordinate their development and marketing efforts that emphasize an area's distinctive features in order to draw tourists.
There is an increasing commitment to preserving an area while developing roads for improved access. Corridor Management Plans (CMP) are being used to establish clear guidelines for development and activities along a route.	While infrastructure development is important for tourism, communities and operators will need to also be aware of the need to act in a way that conserves and protects the area for sustainable development. There is a need to encourage input from various parties and develop a cohesive strategy for tourism along the touring route.
Internet websites for tourist associations are being used to provide information which allows individual tourists to plan their own itineraries and make advance accommodations bookings.	Tourists will be able to develop self-guided tours. There will also be a need for supporting material and interpretive/sightseeing facilities along the touring route to support this self-guided activity.
The BC Ministry of Transportation and Highways is planning on increasing their capital investment in highways to \$490 million, up \$100 million than in 1998/99. ³⁰	There will be an increasing opportunity to obtain funding for highway development and improvement projects which increase tourism in a region.

³⁰ www.gov.bc.ca/tm/min, Ministry of Transportation and Highways website

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Highway And Roads	- Well-maintained and safe. - Good signage. - Scenery and points of interest. - Low congestion.	- Developing highways in scenic areas with regular points of interest en route. - Having clear signage throughout route. - Developing an adequate number of lanes for the traffic volumes.
Sites Of Interest And Pullouts	- Well-signed. - Good access from road. - Adequate parking. - Interpretive information (signs and/or pamphlets).	- Having clear signage which gives ample time to prepare for exit from highway. - Developing pullouts at regular intervals throughout the route.
Maps And Information Guides And Pamphlets	- Easy to obtain. - Includes suggested itineraries and/or routes. - Provides information on food and accommodation.	Developing these maps/guides in cooperation with communities and operators throughout the route.
Food And Accommodation	- Well-signed and promoted in maps/guides. - Available at regular intervals. - Suitable for targeted customers.	Identifying target customers and catering to their needs. So if there are mainly families driving on this route, having motels and restaurants suitable for children as well.
Gas And Service Stations	- Well-signed. - Available at regular intervals.	Ensuring self-guided tourists are well aware of services available before they begin the trip.
Transportation	- Reliable, comfortable vehicle. - Hotel pickup and drop-off.	Ensuring vehicles are well-maintained and operated in a safe manner.
Guiding And Interpretation	- Regularly scheduled sites of interest. - Variety of activities at scheduled stops.	- Hiring personable, knowledgeable guides. - Planning regular stops along the way for meal and rest breaks and sightseeing.

Locations

Road touring is restricted to Highway 37 and the road to Telegraph Creek. The route is very scenic and has become a relatively popular connection between northern BC and the Yukon and Alaska. It makes circle routes possible utilizing the Alaska Highway and/or Alaska cruise ships are the other leg of the circle tour. There are networks of logging and mine access roads but these are not paved and not likely suitable for 2-wheel drive touring.

5.7 Wildlife Viewing

SWOT

Strengths	Nationally significant wildlife resources...Concentrations of mountain goat, mountain sheep, grizzly bear, moose and caribou...
Weaknesses	Distance from markets...Cost of accessing the area ...Access to wildlife habitat...Difficulty of assuring availability of wildlife...Lack of wildlife viewing areas.
Opportunities	Create wildlife viewing sites (platforms, interpretation and trails)...Develop wildlife viewing tours
Threats	Lack of services...Land use uncertainties

Key Trends and Issues

Issue/Trend	Implications
Ecological reserves, which promote scientific study and conservation of wildlife, are becoming more popular.	This will limit commercial development and public access to wilderness areas. Where wildlife viewing is permitted, operators will need to demonstrate their commitment and ability in conserving and minimizing their impact on wildlife.
The number of resident killer whales in BC is shrinking. ³¹	More stringent government regulation of whale watching tours is expected within 19 months from the Department of Fisheries and Oceans. In the meantime, self-regulation amongst commercial operators will be encouraged with measures such as restricting the number of trips.
There are approximately 85 commercial whale watching tour boat operators on Vancouver	Consolidation of whale watching tours is likely to avoid overcrowding and as more operators

³¹ "Has Whale Watching industry peaked?", Business Examiner, October 5-18, 1999.

Issue/Trend	Implications
Island with 5 or 6 getting 80 percent of business. ³² Similar ratios can be assumed for land-based wildlife viewing operations.	become less profitable. Even with low barriers to entry for those owning boats already, the degree of competition could result in more operators exiting than entering the industry in BC.
Conflicts with hunting	For bear viewing in particular, the reported cases of hunting interests clashing with viewing activities are increasing. Such events can be very damaging to the visitor experience and jeopardize market and product development.
Habituation	Wildlife managers are concerned about the habituation of wildlife to the presence of humans. Not only does this diminish the viewing experience, it can present safety problems, for example in the case of bears.

Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Wildlife Viewing	- Wildlife sighted within a reasonable timeframe (30 minutes). - Good access to viewing sites. - Uncrowded conditions. - Pristine, scenic environment.	- Developing good knowledge of wildlife behaviour to determine best viewing times (time of day and year). - Establishing limits to prevent overcrowding and regulations to avoid unduly disturbing the wildlife. - Coordinating efforts across all tour operators to avoid overcrowding and to maximize viewing opportunities.
Transportation	- Convenient transportation to and from viewing points. - Safe, certified vehicles. - For boats, good on-board facilities to create a more	- Developing good feeder service from high tourist areas to the viewing areas. - Meeting or exceeding any safety and environmental

³² "Has Whale Watching industry peaked?", Business Examiner, October 5-18, 1999.

Product Component	Key Success Factors	Lever For Success
	comfortable and enhanced experience (e.g. use of hydrophones to add an auditory component to the whale watching experience). High utilization of vehicles/boats.	regulations. If none exist, developing a code which is published and followed. - Developing unique ways to add to the educational component of the wildlife viewing experience. - Scheduling tours to maximize the use of assets.
Interpretation	- Knowledge and ability to entertain while educating about the wildlife. - Consideration and conservation of wildlife.	Hiring guides who are knowledgeable and genuinely concerned for the wildlife and also have strong communication/presentation skills.
Facilities	- Sales office with good signage to promote a professional, reputable image. - Interpretive displays and information.	- Finding a good location within the community which is easily accessible and visible. - Working with partners in the community such as researchers to develop interpretive displays.

Possible Locations

There are large populations of several big game species in the Cassiar area. Key species are mountain goat, mountain sheep, grizzly bear, moose and caribou. Excellent habitat exists throughout the area in literally dozens of drainages, some covering hundreds of thousands of hectares. Generally south facing slopes and avalanche chutes are preferred habitat for sheep goats, and grizzly bear. Valley bottom lakes are preferred habitat for moose and caribou. Trumpeter swans tend to concentrate on area lakes at creek mouths.

The capability analysis indicates the wildlife viewing has high potential in most of the region's rivers and drainages.

6. Tourism Development Considerations

6.1 LRMP Tourism Location Analysis

As noted earlier, the Cassiar Iskut-Stikine LRMP process has been evolving as this tourism analysis was conducted. The LRMP process divided the region into a number of zones. As part of the land use planning process, each zone was assessed from a number of perspectives, including recreation and tourism. The following is a description of the tourism strategies associated with each zone. (This information is excerpted from the Draft Recommended Management Direction, dated March 2000.)

Table 6-1 Description of Tourism Management Direction by Zone

Zone	Description	Tourism Recommendations
Hottah Tucho Lakes	Includes the northeastern portion of the plan area outside of Spatsizi Park and north of the Pitman River.	Maintain the wilderness quality of the lakes by locating tourism facilities to reflect the natural setting.
McBride	Comprises the entire McBride drainage running south into the Stikine River.	No specific tourism recommendations.
Klappan	Located along the western flank of Spatsizi Park comprising the greater and little Klappan drainages.	No specific tourism recommendations.
Iskut Lakes	Includes the lakes of Kiniskan, Tatogga, Eddontenajon, Ealue and Kluachon.	Management emphasis of front-country tourism. Prepare a recreation plan for the area. Develop front-country attraction such as heritage, trails, viewing sites and access. Manage visual quality. Locate facilities to reflect the natural setting.
Mount Edziza	Formerly known as the Mount Edziza Recreation Area on the east side of the park.	No specific tourism recommendations.
Kakkidi/ Mowdada/	Comprises the Klastline Plateau and the area immediately east of the lake chain.	Prepare a recreation plan for the Iskut area.

Nuttlude Lakes		Identify areas for front and back-country use. Provide direction of tourism opportunities. Manage public access.
Todogin	Includes the Todogin Plateau and Tsatia Mountain	Manage levels of recreation use. Establish limits of acceptable change. Direct recreational use to specific sections.
Middle Iskut	Follows the Iskut River to Forrest Kerr canyon, and includes the Highway 37 corridor.	Provide opportunities for front-country tourism development at Devil Lake.
Lower Iskut	Connects the Middle Iskut and Lower Stikine-Iskut zone.	No specific tourism recommendations.
Unuk River	Comprises the portion of the Unuk River watershed south of Sulphurets Creek.	Encourage low-impact recreation-tourism activities.
Lower Stikine-Iskut Coastal Grizzly/Salmon	Includes the valley of the Stikine from the Chutine confluence to the US border, and the lower Iskut River.	Manage recreation and tourism for a back-country experience.
Chutine	Comprises the entire Chutine watershed	Maintain the wilderness quality of Chutine Lake by locating tourism facilities to reflect the natural setting.
Telegraph Creek Community Watershed	Contains the Telegraph Creek watershed	No specific tourism recommendations.

As the table indicates, the area has a number of locations that offer high tourism development potential. The key frontcountry zones are the Iskut Lakes, Kikkidi Lakes chain, and the Middle Iskut River. Backcountry zones are Hottah Tacho Lakes, Kikkidi Lakes chain, Todogin Plateau, Lower Stikine River, and the Chutine Valley.

6.2 Product/Zone Match

The following table summarizes the product or activities that appear to have potential in the various resource management zones used in the LRMP process. Cells that have been checked indicate that the area has resource potential to sustain the activity. It does not refer to the market or economic viability of the activity. The table is intended to highlight those areas with high potential for particular activities. Lack of mention for a particular product does not necessarily infer no potential, but rather less potential than the "checked" zones.

Table 6-2 Cassiar Iskut-Stikine LRMP Resource Management Zones

Zones	Fishing	Hiking	Lodges	Ski Touring	River Rec.	Road Touring	Wildlife Viewing
Lower Stikine	x				x		x
Lower Iskut	x				x		x
Unuk	x				x		x
Middle Iskut	x	x	x	x	x	x	x
Mount Edziza		x		x			x
Nuttlude-Mowdade	x	x	x	x	x		x
Iskut Lakes	x	x	x	x		x	x
Todagin Plateau	x	x	x	x			x
Klappan	x	x	x	x	x		x
Hottah-Tucho Lakes	x	x	x	x	x		x
McBride	x	x	x	x			x
Tuya	x	x	x	x	x		x
Chutine	x		x	x	x		x
Telegraph Creek		x		x			x
Mount Edziza Park	x	x		x	x		x
Spatsizi Park	x	x		x	x		x
Stikine River RA	x				x	x	x

As evident from the "x" marks in the table, the Cassiar region has a vast array of terrain suitable for a variety of activities. The bold red "x" marks indicate the areas that not only have resource capability, but also may have the best opportunity to be developed based on proximity to markets and ease of access.

6.3 Community Links

Linking the products or outdoor adventure activities with the communities is an important component of this research. The linkage is intended to provide a process for the community to benefit from developing the tourism resources. Table 6-3 illustrates the link between the products and the communities of Dease Lake, Iskut and Telegraph Creek. Following the table is a discussion of the general kinds of developments that would appear to have merit for each community.

Table 6-3 Product Suitability by Community

Products	Front	Back	Dease Lake	Iskut	Telegraph Cr.
Fishing	x	×	M	H	H
Hiking	x	×	M	H	H
Lodges	×	×	M	H	H
Ski Touring	-	×	-	M	M
River Recreation	x	×	M	M	H
Road Touring	×	-	H	H	M
Wildlife Viewing	×	×	M	M	H

× = Primary or major opportunity

x = Secondary or more modest opportunity

H = High suitability or linkage based on quality or proximity of the resource to the community

M = Moderate suitability or linkage based on quality or proximity of the resource to the community

The following comments are based on our observations of what would appear to benefit each community from a tourism perspective. It also discusses the linkage between the products listed above and the communities.

6.3.1 Dease Lake

Dease Lake is the largest community in the region and acts as the area's administrative centre. It contains the Government Agent's office, the health clinic, and the UNBC college satellite campus. However, Dease Lake is not incorporated, nor is it in a regional district. Consequently, all community issues are dealt with by the Ministry of Municipal Affairs in Victoria. Consideration should be given to incorporation to provide local control over civic affairs, including tourism development issues.

Dease Lake could benefit significantly from the outdoor adventure products reviewed as part of this analysis, although probably to a moderate degree. This lack of a strong linkage is due mainly to the backcountry nature of most of the products. A walking trail in the vicinity of Dease Lake, preferably near wildlife habitat, would be an ideal component of community tourism infrastructure.

Dease Lake is in a strategic location in the region – being on Highway 37 and about mid-way between Terrace/Smithers and Whitehorse. The range of services and the “day's drive” stopping distance make Dease Lake a logical stop for Highway 37 travellers.

The community has the opportunity of developing an interpretive attraction to highlight and educate people about the landscape and resources in the area. BC Parks is expected to be the logical agency to develop such a facility because of the proximity of Spatzizi and Mount Edsiza Parks. A key part of the storyline for such a facility would be the Stikine River, including its geology (the Grand Canyon of the Stikine), fishing (all salmon species), and use as a transportation corridor (paddlewheelers to jet boats).

6.3.2 Iskut

Iskut has the opportunity to benefit from a number of the outdoor recreation activities reviewed in this study. A "High" suitability has been attached to fishing, hiking, lodges, and road touring. Fishing opportunities exist all around Iskut, but perhaps the best location(s) are the Iskut Lakes (although these lakes are some distance to the south).

The greatest opportunity to benefit hiking is to focus on the Telegraph Trail, particularly the leg to Telegraph Creek. This historic route could become a popular hiking experience. It is made significant to the tourist industry because it connects two communities that could both benefit economically from pre and post hike activities.

Lodge development around Iskut is also a possibility, particularly if associated with outdoor activities. Road accessible lodge development, particularly in the vicinity of the

Iskut Lakes and/or the Iskut hot springs offer potential.

Another very significant tourism development opportunity for the community is a Tahltan Cultural Centre. The Tahltan people have resided in the area for thousands of years and have a rich and varied culture. Non native interest in first nations culture is strong, and a market opportunity may exist to develop a facility to interpret first nations culture for this market.

6.3.3 Telegraph Creek

Telegraph Creek has the opportunity to expand its tourism industry based on several outdoor recreation activities. The key activities having potential are expected to be fishing, hiking, lodge development and river recreation.

Fishing opportunities exist on the lower Stikine and on surrounding lakes, accessible either by trail or by float plane. The hiking opportunity along the Telegraph Trail is expected to be particularly significant, both south to Iskut and north to Atlin.

The access road to Telegraph Creek from Dease Lake is one of the most spectacular mountain roads in British Columbia (and probably Canada). It traverses the Grand Canyon of the Stikine offering tremendous views for much of its 110 km length. However, the road can be intimidating for persons not comfortable with gravel mountain roads or who have large motor homes or trailers. An opportunity exists to provide a guided and interpreted van trip to Telegraph Creek.

The location of the community on a bluff along the river shore, and the number of well preserved heritage buildings makes for a very interesting side trip visit. Continued upgrading and preservation of these buildings would be an asset.

Another extension of the heritage focus linking with the river recreation potential is to offer Riverboat tours. Telegraph Creek was the head of navigation for river boat activity on the Stikine and there could be market interest in riverboat tours.

6.4 Non-Adventure Tourism Development Opportunities

The terms of reference for this project specify that the focus be an adventure tourism opportunities. However, in addition to the products discussed above, our research revealed other tourism resources in the region that could become the focus of tourism development. These are listed and briefly described here (in no particular order).

A "Must See" Attraction

The region has world-class outdoor resources with a limited pass-through market and a highly segmented activity market. Having the ability to showcase or interpret the physical resources of the area, in a convenient and accessible location, would be a major asset for tourism in the area. An opportunity exists to develop a public interpretation centre, interpreting the area's landscape, flora and fauna. This could become the area's "must see" attraction. BC Parks should be encouraged to consider this interpretive opportunity as part of its upcoming master planning update for Mount Edziza and Spatsizi Provincial Parks.

Heritage Development

The Cassiar region has had a colourful history and evolution. Remnants of this history are perhaps most evident in two areas – heritage trails and the heritage buildings in Telegraph Creek. Both offer excellent interpretive possibilities. The BC Heritage Trust, BC Parks, Forest Renewal BC, could have a role in these developments.

Native Culture

The region has a rich native heritage based on continuous settlement of the area for thousands of years. There is also strong market interest in native heritage and culture. This interest is particularly strong among Americans and Europeans – two groups that comprise a large share of the existing market. The Tahltan First Nation have an excellent opportunity to develop such a facility.

Gateways

Highway 37 is the travel artery in the area and crucial to the region's tourism future. Route gateways at the north and south would provide the user information and history on the route. The province should be encouraged to expand its Gateway program to include Highway 37.

Flightseeing

The size of the region and the limited number of roads make viewing the area difficult for the current road-based markets. An appeal of the area is the vastness and the spectacular natural resource. A convenient way to take in this scenery is from the air either by fixed wing aircraft or helicopter. Opportunities exist for commercial flightseeing based out of all three communities.

Placer Mining

The area's recent history and economic development has been largely based on mining. Opportunities exist for tourists to try gold panning in some selected sites. Public panning is permitted on staked claims for incidental use. There may also be an interest in placer claim holders catering to tourists. Interested parties should pursue the opportunities.

Mine Tours

The Cassiar region has several active mines. The largest is Eskay Creek, which is one of the largest gold and silver mines in the world. It is located west of Highway 37 at Bob Quinn Lake. Tours of the mine site are offered but could be expanded.

6.5 Tourism Development Services

Tourism development opportunities in the Cassiar, based on the above suggestions, fall into two categories. There are the business development projects that could evolve from this opportunity identification. This would involve individuals or companies developing tourism businesses based on the resource and market analysis presented here. This process could involve business expansions by existing tourism operators. It could also involve residents of the area who are not currently involved in tourism but would like to get into the business. The third group of potential operators is non-residents or external investors who could expand the tourism industry by developing these products.

The other category of opportunities is community, infrastructure or training initiatives that are not related to specific businesses. These topics are community oriented and are focused on improving the tourism industry. They are intended to broaden the base of tourism by creating larger markets.

6.5.1 Business Support Services

In order to pursue the opportunities that have been identified in this report, some related support activities should be considered. Most of the tourism businesses in the area are small family run operations. Furthermore, most have been in operation for some time as there have been few new tourism business start-ups have occurred in the last decade.

Another issue that tends to be typical of "northern" operations is that many of the operators are in the area, and in the tourism business, because of the lifestyle it affords. That is, they may have moved to the area for lifestyle reasons, or they may be in the tourism industry to supplement incomes from other forms of activity. (Conversely, it is common for tourism operators to have to supplement their income from non-tourism activities because of the highly seasonal nature of "northern" tourism.) Some of the support services that would assist expansion of the tourism industry are as follows:

Support The Highway 37 North/37A Tourism Council

The above organization has recently been constituted as an official society. The purposes of the council are to provide a forum for tourism industry operators, to identify tourism opportunities, to undertake cooperative marketing, and to coordinate activities with other tourism organizations. Government and tourism industry operators should support this organization.

Increase Promotion

Due to the dispersed nature of the tourism businesses and their generally small size, it is difficult for these businesses to get their message out. Assistance with group marketing and promotion would be helpful. The new Highway 37 North/37A Tourism Council should be the conduit for coordinating promotion.

Create an identity for the area

Many people in BC and elsewhere have heard of the Cassiar region, but have not visited. There is a strong appeal of the area and an interest in visiting, but the remoteness is a deterrent. Attention should be devoted to devising a way of converting this interest to visits. The new tourism council should devote attention to creating this image and identity for the area.

Consider focusing on "extreme" sports

The popularity of "extreme" sports and other thrill-seeker outdoor activities should be considered. This is a very high end and specialized market but may be a way to create cost-effective publicity for the area. It could create a very visible specialty market that could lead to follow-up interest by the mainstream adventure tourism market.

Improve level of hospitality service

It is reported that the level of hospitality service is low. This is partly based on a lack of training and a lack of awareness about the tourism industry. Access to hospitality training and encouragement of staff to upgrade their skills would help.

Improve access to financing

Financing small rural tourism business is exceedingly difficult. Government could assist with business planning or through matchmaking. Business planning assistance would involve market research, feasibility analysis, and financial planning. Matchmaking would involve connecting existing business operators with outside investors or project partners.

Encourage partnerships

The area's existing operators, and persons wanting to get into the industry, could benefit from financial partnerships. Area residents typically have the local knowledge and interest, but not the financing or access to financing. Government could assist in bringing potential investors to the area to explore the potential of partnering with local business operators.

Continue improvements of Highway 37

Highway 37 is critical to the area's tourism. Other than limited scheduled (and charter) air services, Highway 37 is the only means of access. Improvements have steadily been made but continued upgrading and maintenance are essential to the industry's future. The Ministry of Transportation and Highways should be encouraged to continue its upgrading and maintenance program.

6.5.2 Community Tourism Infrastructure

There are other tourism development opportunities that are of a community nature rather than a specific product or activity. In addition to the possibility of a BC Parks Interpretive Centre and a Tahltan Cultural Centre, two other types of community infrastructure offer potential.

Interpreted walking trails

Easy things to do are required to get existing travellers to stop and to stay longer once stopped. Easily walked interpretive trails in selected locations along Highway 37 would provide a taste of the outdoor/wilderness environment.

Wildlife viewing sites along highway

One of the Cassiar's key asset is the wildlife and large areas of wildlife habitat are located along Highway 37. Developing a series of interpreted wildlife viewing sites would provide the traveller a better opportunity to better view wildlife.

7. Appendix

Appendix A – Cover Letters

(Sample letter to tourism operators)

November, 1999

To: Cassiar Forest District Agency Representatives and Tourism Operators

Re: Cassiar Forest District Tourism Opportunity Study

The Ministry of Small Business, Tourism and Culture (MSBTC) is conducting a Tourism Opportunity Study in the Cassiar Forest District. This is one of a series of similar studies being done around the province. The Cassiar project is being undertaken by the Economic Planning Group (Victoria), in association with Meredith and Associates (Smithers), and Timberline Forest Inventory Consultants (Victoria).

This project involves a number of research steps intended to define tourism resources and markets in the district. The final product will be a series of community profiles documenting specific tourism development opportunities.

This information package contains the following items:

- a letter of explanation from Bruce Whyte (MSBTC)
- a description of Tourism Opportunity Studies
- a key map
- a background document on the Cassiar Tourism Opportunity Study process
- an operator questionnaire (if relevant)

Your assistance would be appreciated in providing information and opinions to assist in our analysis. Myself or Greg can be contacted at the numbers listed below.

Sincerely

Economic Planning Group

G. David Hall

(250) 652-6677

Meredith & Associates

Greg Meredith

(250) 847-3196

Ref: 40510-20

November 15, 1999

Tourism Business Operators
North Coast, Campbell River, Port McNeill,
Kalum, Cassiar, Fort St. James, Robson Valley,
100 Mile House and Horsefly Forest Districts

Dear Tourism Business Operators:

The Ministry of Small Business, Tourism and Culture (MSBTC) is conducting a Tourism Opportunity Study (TOS) in your area. This letter is written to encourage you to cooperate with the consultants working on this project as we work to expand our existing product base and introduce new opportunities for tourism businesses.

If you've been in business for more than about a year, you've probably already answered at least one survey on your operations from this office. Please be patient with this new request for information. We have shown any information we now hold on the form provided, so your job will be as easy as reading it over and making any needed corrections. If you haven't been surveyed before, we ask you to take the time to fill in the forms as completely as possible.

"What's in this for me?" you may ask. Earlier MSBTC surveys were looking to provide input to regional land use plans (like the LRMPs), where we wanted to the land use plans to reflect the importance of our industry. Now, we're going a step further, trying to identify specific opportunities for new or expanded tourism businesses, which can serve to diversify and expand the economies of BC's communities. Knowing who is currently in business, what products are offered, and what natural/cultural resources are important to existing businesses, is more important than ever. We MUST have an accurate picture of the industry today, if we are to plan for its sensible, sustainable growth. With your help, we can give tourism a prominent place in the development of a liveable future for BC's communities.

Yours truly,

Bruce Whyte
Resource Planner
Tourism Policy and Land Use Branch

phone (250) 356-8797

(Sample letter to Cassiar Region First Nations)

Ref: 40510-20

January 10, 2000

RE: Cassiar Tourism Opportunity Study

Dear Chief

The Ministry of Small Business, Tourism and Culture is conducting a Tourism Opportunity Study (TOS) in your area. This letter is written to inform you of this activity, and to invite you to assume an active role in directing the project. You are invited to participate by selecting a representative to join the project's Industry-Government Partnership Team, working with the project consultant, Mr. David Hall of the Economic Planning Group, phone (250) 652-6677.

Our goal is to expand the existing base of tourism products and introduce new opportunities for tourism businesses. Our strategy is to identify opportunities to expand the tourism industry in ways that are supported by local residents, communities and First Nations. While it is beyond the scope of this project to identify individual business ventures, it is reasonable to expect that this study will shed light on opportunities where First Nations entrepreneurs might take a leading role.

We look forward to your leadership role in ensuring the success of this study. With your help, we can give tourism a prominent place in the development of a liveable, sustainable future for BC's communities.

Yours truly,

(for) Brian Dolsen

Assistant Deputy Minister

Tourism and Corporate Policy Division

Appendix B – Contacts

CASSIAR CONTACTS

Name	Affiliation	Phone/Fax/e-mail
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Demetzer, Harold	Northern Development Commission	565-6246 Harold.Demetzer@gems8.gov.bc.ca
Diaz, Rob	Tahltan Land Use Study	564-3385/563-7792 Cel 612-8800
Drury, Gregg	The Bike Hike and Paddle Touring Co.	234-3456/same bikehikepaddle@ibm.net
Duesener, Beverly	Arctic Divide Inn	771-3119
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Cassiar Region

Tourism Opportunities Analysis

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Whyte, Bruce	Min. of Small Buisness, Tourism and Culture	356-8797/6555 bruce.whyte@gems3.gov.bc.ca
White, Joanne	Timberline Consultants	480-1101/1412 jwt@timberline.ca

Appendix C – Information Sources

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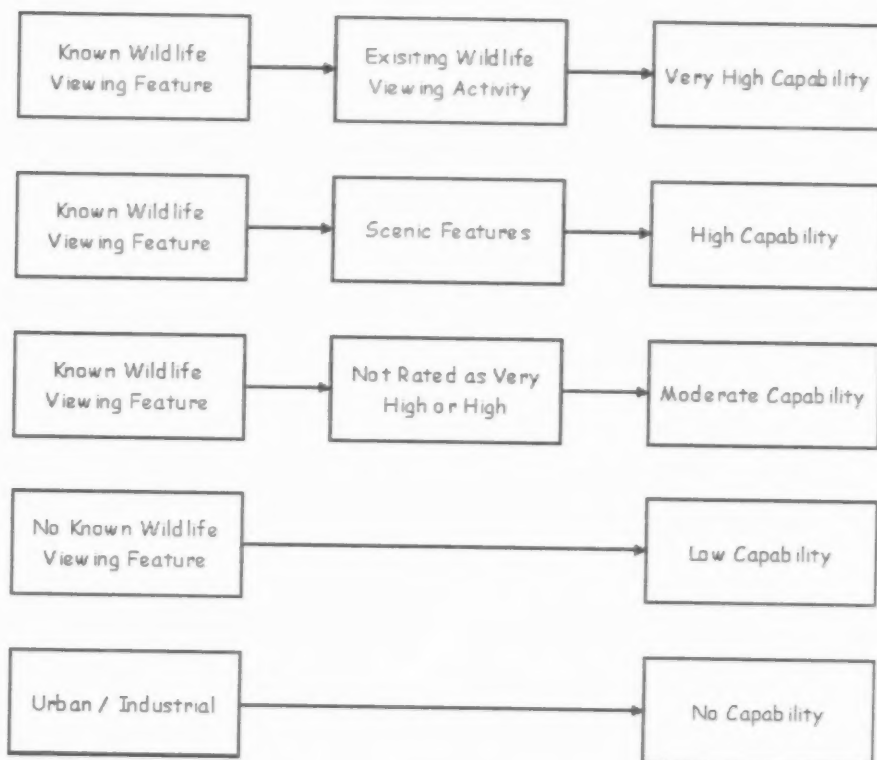
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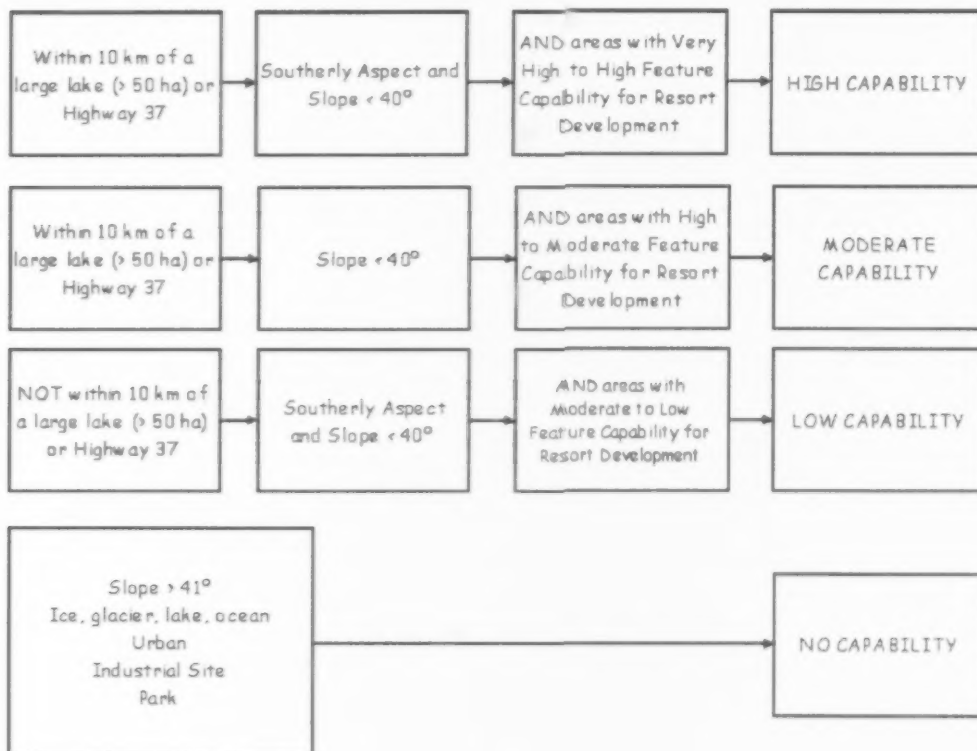
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Appendix D – Schematic Models

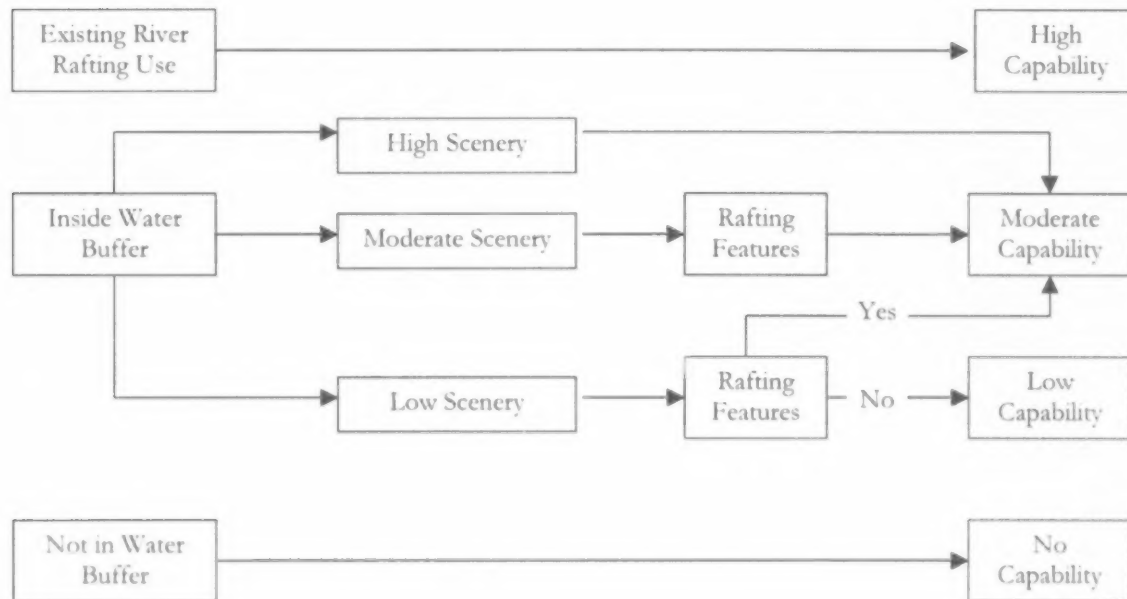
Wildlife Model



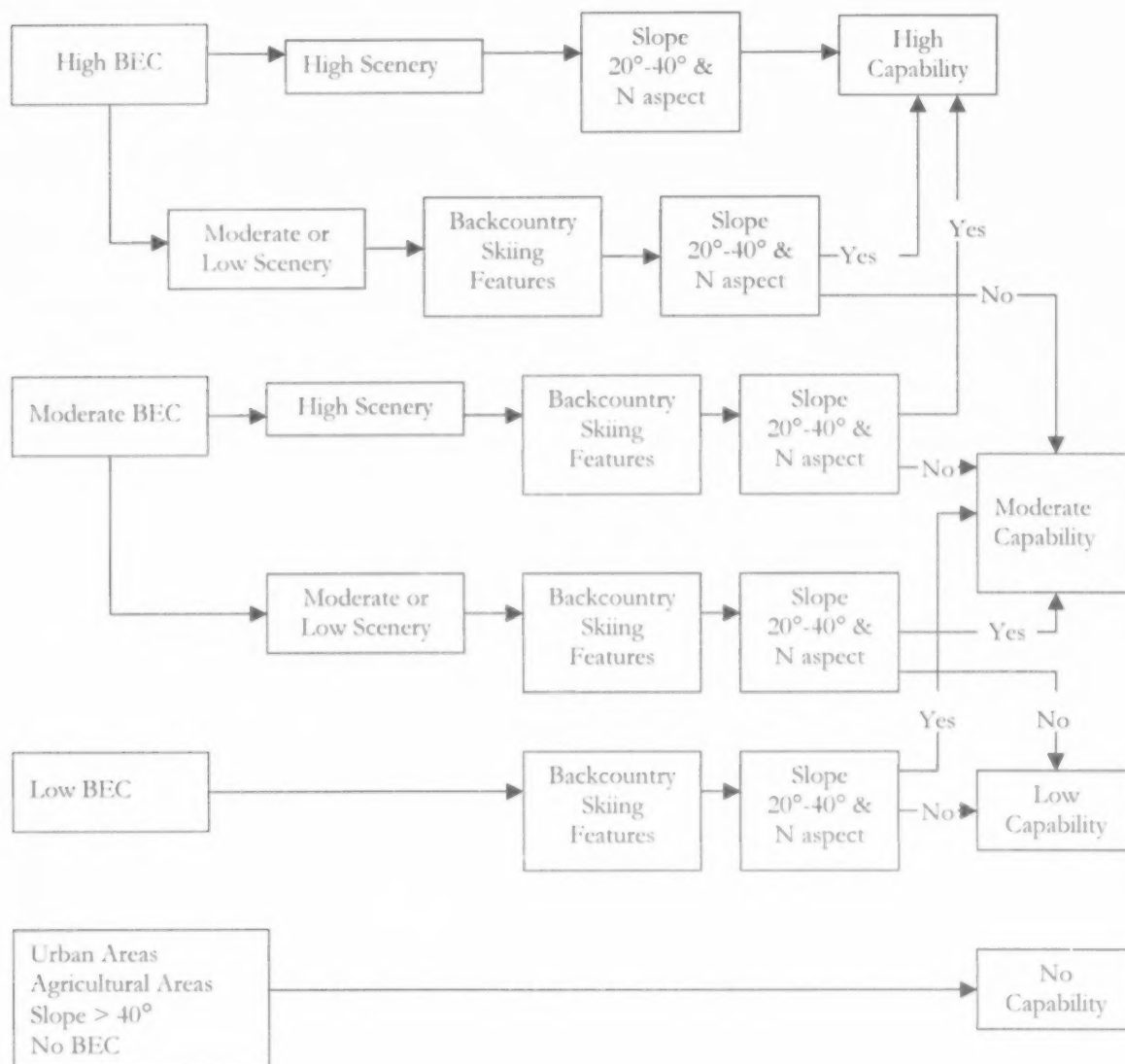
Lodge Model



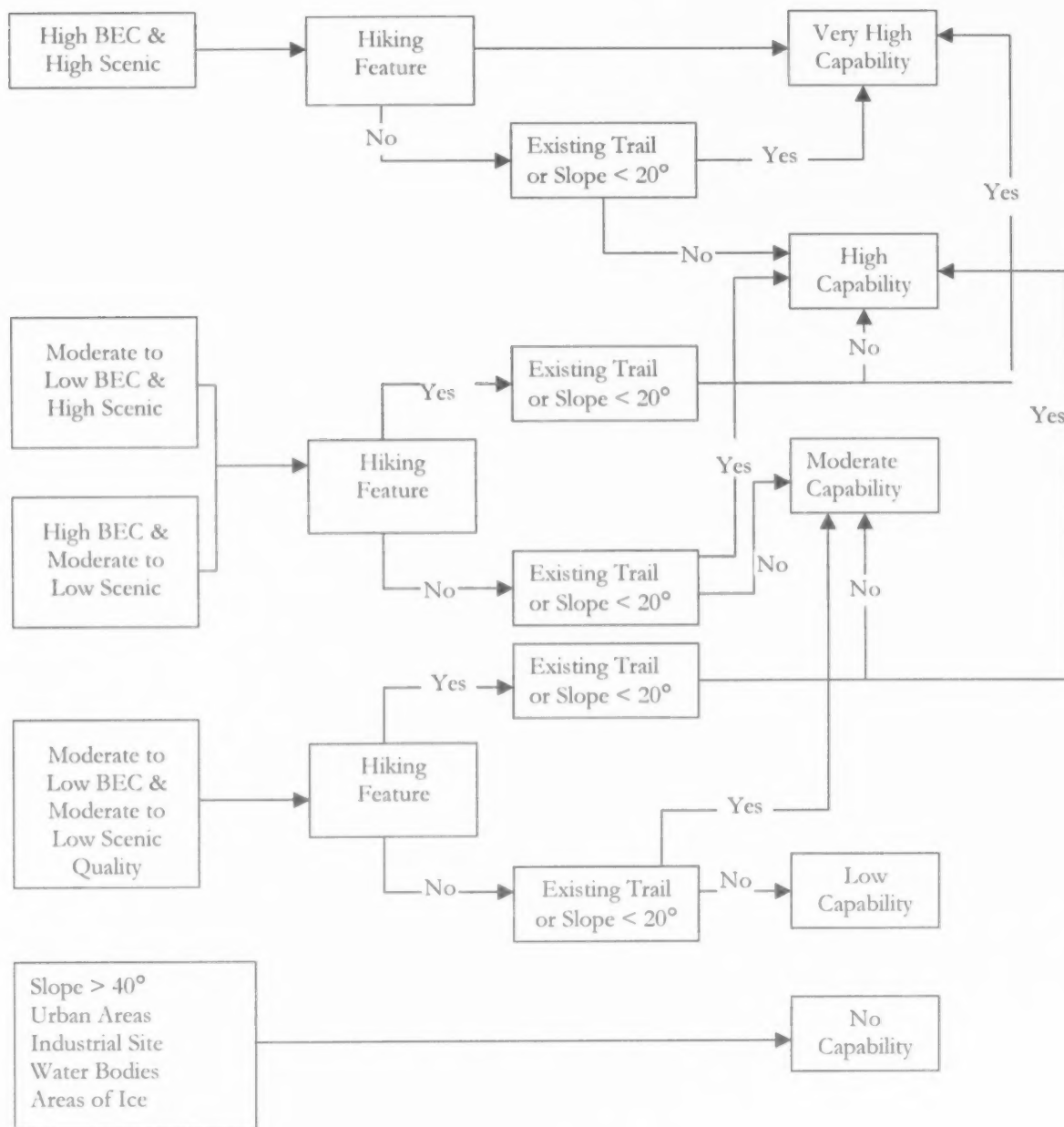
River Recreation Model



Backcountry Skiing Model



Hiking Model



7.1 Appendix E – Product Maps

See Map Information section.